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In the balance: work/life balance of senior development professionals within higher education

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In the balance:
Work/life balance of senior development professionals
within higher education

by

Karlene Noel Jennings

A dissertation submitted to the graduate faculty
in partial fulfillment of the requirements for the degree of

DOCTOR OF PHILOSOPHY

Major: Education (Educational Leadership)

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CHAPTER 1

Introduction

In modern Western society, the concept of work/life balance is an often discussed, yet frequently elusive, ideal. Typically, many individuals assume balance is a gendered concept (Aburdene & Naisbitt, 1992; English, 2003; Goode, 1960; Stephens, 1994) that applies only to women. Today, several studies have revealed that the construct applies to professionals of both genders and at various levels of their professional careers (Armour, 2003; Blair-Loy, 2003; Byalick & Saslow, 1993). For many individuals—women and men alike—work/life balance has become the proverbial “brass ring” for which they strive in their efforts to balance family, work, and personal interests. Yet work/life balance is not simply essential for the health and well-being of individuals, but is also cost-efficient and stability-enhancing for institutions and work-environments (Perrons, 2003).

The idea of work/life balance may be approached directly with tips and tricks to improve multitasking or with suggestions to shave needed minutes from often mundane responsibilities (Blanchard, Blanchard, & Edington, 1999; Fanning & Mitchener, 2001; Johnston & Smith, 2001; Merrill & Merrill, 2003). Indirectly, the topic may be addressed with discussions of retention programs and “burn-out” prevention in the work place (Blair-Loy, 2003; English, 2003). This study addressed the concept holistically by utilizing qualitative methods for exploration within a specific subpopulation.

Topic

Work/life balance has been studied within the context of business, for-profit organizations (Blair-Loy, 2003; English, 2003; Stephens, 1994). It has also been explored within higher education organizations (Johnsrud & Rosser, 2000). Work/life balance is even

a weekly column in *The Chronicle of Higher Education*. Within higher education, many distinct subpopulations might be explored through a work/life balance lens: from adult students to tenured faculty members, student affairs professionals to student athletes. When identifying a subpopulation through which to explore the work/life balance phenomenon, I decided to select a population with which I am familiar, but of which I am not a member. Consequently, I selected senior development professionals, that is, people who are institutional fundraisers with 12 or more years experience and who also manage a staff. This study sought to identify how work/life balance is achieved or not achieved in their lives and how higher education and the development profession can help to minimize competing demands on them and support role integration.

Not all higher education institutions display the same characteristics regarding size, governance, and myriad other criteria. As will be apparent in the literature review, a number of studies have been conducted concerning work/life balance within large, multi-dimensional organizations. Consequently, I determined that exploring work/life balance in multi-dimensional higher education organizations would allow me to utilize and draw upon the existing literature base. Using the Carnegie Classification of Institutions of Higher Education system developed by the Carnegie Foundation for the Advancement of Teaching, I selected Doctoral/Research Extensive Institutions (formerly referred to as Research I Institutions) as they were determined to be the most complex organizational type (Carnegie Commission, 2006). Additionally, as there are fundamental differences in development work between public and private institutions of higher education, this study focused solely on public institutions. Therefore, this research project focused on the work/life

balance of senior development professionals at public Doctoral/Research Extensive Institutions.

Purpose

The purpose of this qualitative study was to explore the phenomenon of work/life balance through the reported experiences and reflections of a selected group of senior development professionals. By investigating this little-understood concept from the perspective of senior development professionals, the expectation was that potential suggestions for institutional implementation of work/life programs or suggested changes to existing programs would be identified. Further, as the research currently available concerning institutional advancement and institutional advancement professionals is limited, this research project had the opportunity to identify new approaches to position retention and staffing in the field of institutional advancement.

Potential Significance

The potential significance of this qualitative research project is notable since little scholarship exists concerning work/life balance among institutional advancement professionals. This research may also yield some discoveries concerning individuals' abilities to achieve work/life balance while managing a career as an institutional advancement professional. This information may encourage changes in policy and practice within their workplaces or those of other institutions. Additionally, as turnover of staff in the advancement profession continues to be a problem (Collins, 2002), it is hopeful that the study of senior advancement professionals will identify reasons why staff leave their positions and reveal some strategies to reverse the trend.

Several groups may be interested in the results and conclusions of this research project. They include institutional advancement associations including Council for Advancement and Support of Education (CASE) and Association of Fundraising Professionals (AFP), individual advancement offices interested in achieving higher levels of employee retention, institutional advancement hiring officers, and other senior development professionals who are striving to achieve work/life balance in their lives. Further, this research study may be of interest to those exploring work/life balance dimensions and theory.

Theoretical Framework

The theoretical frames through which the topic will be analyzed are work/family border theory (Clark, 2000) and work-family role synthesis (Kossek, Noe, & DeMarr, 1999). These two theories are distinct from one another but provide complementary research. Kossek et al. (1999) defined work-family role synthesis as “the strategies an individual uses to manage the enactment of work and caregiving roles. It involves decision-making choices governing boundary management and role embracement of multiple roles” (p. 102). Clark proposed work/family border theory that hypothesized “the primary connection between work and family systems is not emotional, but human” (p. 747). Further, Clark asserted that “people are border-crossers who make daily transitions between two worlds—the world of work and the world of family” (p. 248).

Unlike other theoretical frames that will be discussed in the literature review both work-family role synthesis (Kossek et al., 1999) and work-family border theory (Clark, 2000) espoused the concepts of blending roles between work and family or personal responsibilities and did not concentrate on the inherent conflict or “role strain” (Goode, 1960), but rather upon the choices made by the individual.

Research Questions

The primary research questions for this qualitative research project are:

1. How do the respondents conceptualize work/life balance in their lives?
2. What techniques and strategies do senior advancement professionals employ to maintain work/life balance?
3. What are the respondents' perceptions of the level of effectiveness of these techniques and strategies?
4. What do the respondents recommend to the profession to promote work/life balance for development officers?

Definition of Terms

The concept of work/life balance appears to be straight-forward, yet for the purposes of this research project, it needs to be clearly defined. It is essential to define the term “balance” for the purpose of this study to best comprehend the problem to be studied. Simply stated, balance is “a harmonious or satisfying arrangement or proportion of parts or elements” (American Heritage Dictionary, 2000). A more academic definition of balance was expressed by Kofodimos (1993) as:

a satisfying, healthy, and productive life that includes work, play, and love; that integrates a range of life activities with attention to self and to personal and spiritual development; and that expresses a person's unique wishes, interests, and values.

(p. xiii).

Therefore, for the sake of this research project, work/life balance is the congruous arrangement of work and life demands, or as articulated by Thompson and Beauvais (2000), is “the ability to manage job and non-job responsibilities in ways that result in individuals

having satisfying and productive work and non-work lives” (p. 165). Moreover, as a number of related phrases are present in the literature including “work/family balance,” “family/work agreement,” and “work and life balance,” for the sake of this research project the term “work/life balance” will be used to refer to the concept under study (unless a specifically named or cited source is utilized).

Many institutions and individuals used the terms institutional advancement, development, and fundraising interchangeably. However, they are not the same. Institutional advancement refers to the fields of alumni relations, development, and communications. On the other extreme, fund raising (or fundraising or fund-raising) for some conjures up the process of raising money that involves little or no strategy or planning. The term development can often be confused with software development or the developing world. For the sake of this study and ease in integrating the interviews with respondents, the terms institutional advancement, development, and fundraising will be used interchangeably. In this study, the term senior development professional will refer to an individual who works in institutional advancement and has held his or her current (or similar) position for no less than 12 years. Twelve years in institutional advancement represents a commitment to the profession based upon common thought in the profession. Moreover, the different titles of participants in this research study present problems for the reasons already outlined. Many campuses have different approaches to titles and ranks, so an assistant vice chancellor at one institution may have the same responsibilities as an associate vice president at another. Furthermore, with the discussion focused upon public Doctoral/Research Extensive Institutions, these institutions may have institutionally-related foundations (private entities charged with raising funds for the institutions) instead of an institutional advancement office.

For the sake of this research study, senior development professionals may be aligned with either type of organizational structure.

Delimitations and Limitations

For a number of reasons, this project will focus upon development professionals in public, Doctoral/Research Extensive Institutions of higher education as determined by the Carnegie Foundation for the Advancement of Teaching. This delimitation is necessary because of the obligatory differences among institutions of higher education and the size and scope of development functions within those institutions. Further, the characteristics of development officers in these research institutions are different from the characteristics of officers in smaller institutions (Collins, 2002). Differences in governance and the need for fundraising between public and private institutions also makes it necessary to focus upon one subpopulation as opposed to a mixture of governance structures.

The results and conclusions of this study, as well as its applications for future research, will therefore be limited to senior development professionals in academe at public Doctoral/Research Extensive Institutions. Further, as this is a qualitative study, conclusions that directly relate to persons and/or career choices associated with the participants should not be used to create generalizations for other development professionals from similar subpopulations. Yet, the voices of these professionals can help articulate some of the concerns of development professionals within a certain setting, providing evidence of the importance of work-life programs at any institution regardless of size, governance structure, or other limitation. Consequently, some of the suggestions for institutional and/or divisional change offered by the participants may be worthy of discussion and will be discussed on a national, regional, and local level, leading to the development of balance-friendly policy.

CHAPTER 2

Review of Literature

In order to best organize the literature related to work/life balance, development, and higher education for this research study, extant literature has been divided into the following subsections: (a) scholarly publications about work/life balance in general, (b) theoretical frameworks related to work/life balance, (c) resources for individuals related to work/life balance, (d) resources for human resources professionals related to work/life balance, (e) gendered perspectives in work/life balance, and (f) work/life balance through the lenses of other professions (i.e., business, medicine, law, education, federal government, non-profit, and higher education). Further, higher education fundraising literature will be discussed in general as it can be applied to work/life balance in development. Lastly, the literature will be summarized as it relates to the methodological research strategy for a qualitative, phenomenological, and gender-neutral study of senior advancement professionals in higher education.

Work/Life Balance: General Discussion

For the sake of providing a proper foundation of the general concepts in existing literature, several works on organizational behavior were consulted. Moorhead and Griffin (2001) referenced the phenomenon of work/life balance in their text. First, they addressed the fundamentals of work/life relationships that include the interaction between a person's work life and personal life. Following this discussion, they presented the concepts of work/life balance—competing demands, finite time, achieving equilibrium between personal and work priorities. Interestingly enough, Moorhead and Griffin did not mention conflict theory (that balance simply is not possible and that work and life would always be competing for

personal attention) in their discourse but did focus on individual choice: “People also have to decide for themselves what they value and what tradeoffs they are willing to make” (p. 241).

Unlike Moorhead and Griffin (2001), Johns and Saks (2001) focused upon work/family conflict. In their organizational behavior text produced for Canadian audiences, they cited studies that found Canadian businesses lost \$2.7 billion a year in costs associated with work/family conflict (Johns & Saks, p. 433). Johns and Saks also referenced a number of company and legislatively-mandated family-friendly policies (medical leave, flex-time, childcare programs, and stress management programs) and work/life programs in place at a number of companies in a variety of industries. These two examples differentiate several of the possible dimensions through which the issues of work/life balance may be explored including organizational resource factors, policy considerations, and personal determinations and choice.

In a broad integration of theory, practice, and circumstance, as well as the multiple angles through which the problem can be viewed, Thompson and Beauvais (2000) also examined the concept of work/life balance. They articulated the main definitions of the concept and discussed the inherent role conflict of managing multiple roles. Thompson and Beauvais outlined three main types of conflict: (a) time-based conflict—which priority, work or life, receives the most attention, (b) strain-based conflict—the personal understanding and emotional (internal) strain between work and life, and (c) behavior-based conflict—the process of choosing one type of priority over the other (p. 182). In addition to the conflict theories for work/life balance, they recommended coping strategies for achieving balance by “modifying the stressful situation, changing the meaning of the stressful situation, managing the symptoms of stress, reactive coping (trying to do it all), and obtaining support from

friends, family, co-workers, and others” (p. 182). Thompson and Beauvais also presented strategies for policy development for companies including time-based strategies, information-based strategies, money-based strategies, and direct services. In addition, they discussed information concerning both the formal and informal barriers to work/life policy within organizations and the strategies to overcoming these barriers.

To place work/life balance in the proper context, the U.S. Bureau of Labor Statistics (Clarke, 2001) categorized five key trends that will affect individuals and workplaces during the 21st century. Among these trends was the movement to accomplish work/life balance. The Bureau of Labor Statistics asserted that the changes in traditional gender roles, coupled with dual career families and single heads of households, have exacerbated the lack of balance. Among the statistics cited were that 87% of individuals would work harder for companies that would assist with work/family issues. Recent census statistics show two career families are 64% of the population, and single-parent families account for 27%. Two career families and single parent families accounted for 91% of the U.S. workforce.

Theoretical Perspectives/Frameworks

Kossek, Noe, and DeMarr (1999)

The two main theoretical perspectives that will be utilized for this study are Kossek et al.’s (1999) work-family role synthesis and Clark’s (2000) work/family border theory. Both frameworks advocated for role integration of work and life responsibilities. Kossek et al. described their theory as “the strategies an individual uses to manage the enactment of work and care giving roles. It involves decision-making choices governing boundary management and role embracement of multiple roles” (p. 102). Further, the authors asserted, “By mainly focusing on measuring and describing conflict, the work-family conflict

literature overlooks the individual's influence on the selection of personal strategies for work/family role integration that may beget spillover and conflict in the first place" (p. 103). They stressed the likelihood that the work-life domain can cause personal/internal conflict. Kossek et al. based their theory upon previous research on role embracement and role conflict theory and coping mechanisms.

The basic premise of Kossek et al.'s (1999) theory was that organizational context combined with individual context yields work and family outcome (see Fig. 1, p. 109). They further explained:

A person's ability to demonstrate skills in managing work-family roles is dependent on having a work context that affords one with the opportunity to exercise discretion or choice. The individual and his/her family role are embedded in a work context with formal and informal aspects influencing strategy choices. (p. 108)

After explaining their theory, Kossek et al. (1999) went on to apply it to caregiving roles such as parent to child. Their suggestions for future research included research about how employees modify strategies for role synthesis and how these strategies are chosen within the context of other frames of reference, such as the role expectations of employers and those of other familial stakeholders. Lastly, they stated a hypothesis on which I will base my interview protocol questions:

The ability to learn and demonstrate skills in work-family management is dependent on having a supportive context that allows one to exercise choice. This is a critical research issue of importance not only to managers, but also to society in general. A fundamental problem facing growing numbers of individuals is how to develop

appropriate strategies to maintain a positive work identity, given their growing work and nonwork demands. (p. 124)

The work/family role synthesis theoretical framework will be employed for this study in conjunction with Clark's (2000) work/family border theory.

Clark (2000)

In her introduction, Clark (2000) outlined several gaps in the extant theory pertaining to the work/life and work/family balance arena. These gaps included the lack of a comprehensive theory that explains why conflict and balance occur, encompassed human interaction and meaning creation for individuals, and allowed for the complexities of work and home environments (p. 750). Clark further asserted that the theory should be “descriptive of why conflict and balance occurs, predictive of situations and individual characteristics that may lead to conflict or balance, and provide a framework individuals and organizations can use to promote balance between work and family responsibilities” (p. 750). Subsequently, she proposed her work/family border theory.

Work/family border theory involved two separate spheres of influence: work and family. It postulated that individuals constantly “cross the border” through managing and negotiating between these spheres. Depending upon the individual, these borders may be easy to navigate, and the daily transitions between work and family are fluid or difficult and next to impossible to traverse causing much internal and external conflict. Clark (2000) also contended that “people are . . . often tailoring their focus, their goals, and their interpersonal style to fit the unique demands of each [sphere]” (p. 751).

Work/family border theory (Clark, 2000) also includes three main themes about borders. Borders are permeable (demands and people may move between family and work

and vice versa). They are flexible in that the border may expand or contract depending upon the circumstances, goals, and current demands and priorities. They are blendable; as Clark explained, “the area around the presupposed border is no longer exclusive of one domain or the other, but call either domain” (p. 757). Subsequently, in discussing directions for future research, Clark framed the concept as it will apply to this study:

work/family border theory is designed to focus on variables which have proved to be the most meaningful in creating understanding and change: interpersonal relationships and meaning creation, as well as structural factors like organizational policies about time and work. (p. 767)

Work/Life Balance: Resources for Individuals

In addition to the scholarly publications addressed above, a number of sources have appeared in the more popular (non-juried) press. They were still applicable to review for this research project as they may serve as resources for development professionals and others striving to achieve work/life balance, and several are cited in more scholarly texts. Merrill and Merrill (2003) provided theoretical and case-study frameworks for individuals striving to better balance competing demands. Their book provided checklists and self-assessments, in addition to “three gotta dos” for work/life balance: (a) validate expectations, (b) optimize efforts, and (c) develop what they called navigational intelligence (p. 45). Further, Merrill and Merrill are strong proponents of the philosophies of work and life espoused by Stephen R. Covey, the author of *The 7 Habits of Highly Effective People* (1989), and have co-authored other volumes with him.

Johnston and Smith (2001) offered 137 individual vignettes and suggestions for improving work/life balance including sections entitled Risking Life (choosing to concentrate

on self-defined priorities), Space for Life (creating physical and mental boundaries for work and life), and Chasing Happiness (critically thinking about personal happiness and fulfillment). Among the most relevant sections for this project was a foreword written by Smith. His perspective provided a real description regarding the difficulty of finding (and the importance of) work/life balance. Smith described his experiences this way:

Work at this over the top level of intensity was its own reward for me. Nothing else in life seemed to compare to the stakes, the pace, the access, the impact, and the recognition of work . . . Today, my view of work is quite different. I am no less committed to work but now I have a commitment to life as well . . . What broke the spell that work had over me was no one thing, no ecstatic moment of revelation and insight, no major crisis or sudden epiphany, no great escape. Rather, work lost its hold on me over time, through an accumulation of experiences, reflections, and regrets, until at long last I began the slow but steady process of reconstructing my way of life to fully accommodate a balance between life and work. I am still at it every single day. (Smith in Johnston & Smith, 2001, pp. xv–xvi)

Smith's explanation is the type of personal reflection that this research hopes to yield, that is, a qualitative research design that will permit senior development professionals to relate to their own attempts to come to grips with work/life balance.

In a thematic design that reads like a hybrid of Merrill and Merrill (2003) and Johnston and Smith (2001), Fanning and Mitchener (2001) articulated 50 ways to improve work/life balance. They utilized a listing of tips and strategies and included reflection questions and checklists within the vignette topics. Their strategies included cross-cutting advice from time management to money management to relational improvement approaches.

These small strategies set out to use small steps to make personal improvements in work/life balance.

Unlike the previously mentioned popular press materials, Aburdene and Naisbitt's (1992) chapter, "Women at Work: Opportunity, Leadership and Balance" in *Megatrends for Women*, provided much general information for women specifically and was written from a feminist perspective. The authors detailed case studies of women at work as well as up and coming careers for women. They further articulated the need for balance in personal and work sectors.

Another popular-press work (Blanchard et al., 1999) focused primarily on the health concerns of a lack of balance. This book focused on Ken Blanchard's efforts to achieve balance in his work/life, providing insight regarding the possible (and dangerous) concerns such as heart disease and stress-related disorders of living life out of balance and the consequences of a fast-paced lifestyle upon physical well-being.

Work/Life Balance: Resources for Human Resources Professionals

Collard and Gelatt (2000) are among those authors who have explored work/life balance in terms of its implications for career planners. Their work reframed work/life balance in the terms of "life quality." Collard and Gelatt defined life quality in terms of two dimensions: "what individuals do (how time is spent) and their personal experience (thoughts and feelings)" (p. 198). Their work focused upon finding meaning in the quality of, rather than the quantity of, activities or the balance between them. Further, they addressed internal barriers such as goal placement to achievement of life quality and provided exercises for career counselors to use with individuals.

One of the most complete sources for organizations and human resources managers examining the phenomenon of work/life balance was edited by Friedman, DeGroot, and Christensen (1998). This source included a number of exercises to be utilized with employees to improve their work/life balance and with organizations to suggest strategies for work/life balance friendly policies within organizations. Some of the exercises included: (a) “perceptions in the workplace and how they affect career development” (pp. 41–52), (b) “clarifying priorities and building a network of support” (pp. 157–174), and (c) “achieving balance between work and home demands: a self-assessment” (pp. 185–201). This resource, organized by the Wharton Business School’s Human Resources Roundtable at the University of Pennsylvania, provided a multi-dimensional view of the work/life balance constructs.

Lechner and Creedon (1994) presented a different perspective to human resources professionals. Their text provided an overview of changing employment statistics in the United States, profiles of caregivers and resulting work stress and productivity issues, and an analysis of family-friendly benefit programs. Moreover, they discussed the possibilities of public-private partnerships benefiting policy decisions for federal and state programs. Lechner and Creedon offered a view from the personal needs of employees—caring for themselves, parents, and children—as well as the needs and expectations of corporations. Their work supplied a good foundation of current policy issues related to work/life practices in both the public and private sectors.

Gendered Concepts in Work/Life Balance

As stated in the beginning of chapter one, a number of individuals consider work/life balance a gendered construct. There is a growing body of work/life balance knowledge that studies men (Greif, DeMaris, & Hood, 1993; Levine & Pittinsky, 1997) or is gender-neutral

(English, 2003; Fletcher, 2002; Keene, 2001; Kofodimos, 1993), but the majority of scholarly literature focuses upon women and work/life balance. Work/life balance grew out of Goode's (1960) role strain theory—women faced competing demands based upon competing roles in society—and evolved through work-family balance (demands were dichotomous, i.e., either work or family) in the 1980s and early 1990s (Bohen & Viveros-Long, 1981; Kofidimos, 1993). Currently, a number of scholars (Rapoport, Bailyn, Fletcher, & Pruitt, 2002) have advocated for a new name for work/life theory: integration. Others (Clark, 2000; Kossek et al., 1999) also have discussed integrating competing demands but have not sought to change the name of the concept. Those advocating for a name change for the paradigm appear to be deeply rooted in altering gendered concepts in general.

For example, Rapoport et al. (2002) utilized collaborative interactive action research (CIAR) to advocate for their construct known as the “Dual Agenda,” which was the intersection of effectiveness and equity. Their study espoused the concept that work-life integration was not possible without gender equity in organizations. Further, their research approach, although action research oriented, was coupled with a feminist, interpretive frame. Of the studies consulted for this project, Rapoport et al. provided the strongest advocacy for societal change. Their study focused upon individuals becoming change agents within their organizations to advocate for better hours, child care, and other “balance related” needs.

A number of other authors have explored the concept of work/life balance through a gendered lens. Caproni (1997), Blair-Loy (2003), Stephens (1994), and Levine and Pittinsky (1997) are among them. Caproni utilized her personal experience and discussed the concept using a feminist and critical perspective. She asserted that all of the scholarly and popular press may actually weaken attempts at satisfaction in people's lives by projecting impossible

standards for balance and providing illustrations of individuals with “perfect” work/life balance (Caproni). Drawing upon other scholars in the work/life framework (Covey, 1989; Kofodimos, 1993), Caproni presented information specifically about women in general and her own attempts at achieving balance, advocating for not settling for balance, but rather escaping from the work/life balance rhetoric and leading a life she considered fulfilling.

Levine and Pittinsky (1997) advocated strongly for the inclusion of fathers and men in general in the work/life balance constructs. Moreover, they indicated that “when companies have actually surveyed their male employees about work-family conflict—which they have only recently started to do—their level of work-family [conflict] turns out to be as great as for the female employees” (p. 15). In addition to providing background information and statistics about men and work/life balance, the volume included self-assessment exercises and indicated a need for family-friendly policies (i.e., flexible time, employer provided daycare, and sabbaticals) and how to promote a culture that accepts them (including educating supervisors, providing resources in human resources, etc.).

In another study of note, Greif et al. (1993) organized a quantitative study with respect to single fathers and their work/life balance. In their study, they found:

. . . is still clear that most of the men who participated in this research experienced significant problems balancing the demands of work and single parenting. The fathers who are successfully coping found more cooperative work situations and support networks than those who are not. The first step in building more supportive work environments for fathers is to recognize that men as well as women are parents and that, as working parents, they must make adjustments in their work to respond to family needs. (p. 192)

Work/Life Balance in Other Professions

Individuals in business appeared to be the most frequently studied about the issues surrounding work/life balance, yet there have been a number of research projects about individuals in other sectors of society. To keep the project aligned with those in similar professions (and with similar levels of education, experience, and job stress), the subcategories of business, medicine, law, education, technical fields, higher education, federal government, and non-profit were explored. Related work/life studies are presented in synopsis with their relevant potential applications for utilization within the proposed study.

Business

A number of research studies have been devised to analyze the problem of work/life balance in business. Blair-Loy (2003) conducted a recent study of executive women in finance-related fields and women who left full-time careers when they had children. Blair-Loy employed a qualitative case-study design that involved interview, survey, and observation. Her demographic information (education level, income level, marital and family status) with respect to the executive women may prove quite similar to those interviewed in the proposed project. All were well-educated and high-earners within their chosen profession. Of her respondents, 84% had married at least once, and 38% had children (p. 307).

Blair-Loy (2003) also helped confirm the rationale for scheduling two phone interviews and one in-depth personal interview with the respondent as she commented on the difficulties (and time constraints) of interviewing executives. Blair-Loy analyzed the work/family question with the presence of cultural schemas: work devotion and family devotion. Her work provided rich descriptions about the lives of the participants and their

efforts at work/life balances. Through her work, Blair-Loy ascertained popular coping mechanisms (flex-time, job-sharing, etc.) and further described the personal (internal) conflicts experienced by the participants, which included issues of self-worth, family stress, and perceptions of success.

Fletcher (2002) approached the issue of work/life balance differently than researchers in the United States. Studying business elites (equivalents of Chief Executive Officers, Chief Financial Officers, Chief Information Officers, and Chief Operating Officers) in Great Britain, Fletcher's research is part of a growing body of knowledge concerning work/life balance in the United Kingdom. (In 2000, the UK Department for Education and Employment launched a work/life balance for individuals and corporations.) He conducted in-depth interviews with 14 corporate leaders in diverse fields related to their personal and professional experiences with balance. His study was among the most information-rich examined for this literature review because he devoted an individual chapter to each person he interviewed. In addition to the comprehensive interviews, each respondent included his or her top tricks and tips (including spending time with parents, finding a passion for sports or other activities, and keeping a short to do list) for maintaining balance. Fletcher's research also recommended the work/life ratio (a simple test he developed) to provide a quick snapshot of how well the reader was currently achieving balance.

Another related study was a phenomenological research project conducted by Cancilla (1998). She studied the experiences and career paths of 17 independent human resources consultants. She conducted individual interviews with each participant as well as a focus group interview with six participants. Cancilla also indicated that “. . . many of the studies have relied much more on statistical information than detailed case studies of

in-depth interviews” (p. 2), which is consistent with the sources examined within this literature review about work/life balance. While her study only touched upon work/life balance peripherally, she did provide rich, qualitative analysis and constructed metaphors for the career paths of which the result was “changing seasons and landscapes” (p. iii). The first two metaphors were the concept of “finding home” in a professional sense and a “vocational landscape” that values feminine experience and expertise and espouses values in the workplace. Cancilla succeeded in her goal “to capture through the discovery of common themes, the essence of these experiences” (p. 5).

Not all literature related to businesses and corporations focused upon high wage earners and their efforts of achieving balance. Some relevant research focused upon and emphasized business-related policies. For example, the research conducted by Hobson, Delunas, and Kesic (2001) was a survey of stressful life events. They collected data from more than 3,000 U.S. residents regarding stressful life events and tied their findings to work/life balance and the need for additional corporate initiatives. Further they stated that:

excessive job demands and constraints brought about by increasing competitive pressures for improved productivity and cost-effectiveness and rising household financial needs . . . have been offered for why so many U.S. residents fail to achieve a healthy level of balance. (p. 38)

Hobson et al. clearly articulated the stressors for individuals (missing time with children and spouses, unsafe coping mechanisms such as sleep deprivation, overeating, abusing drugs or alcohol, absenteeism, etc.) who lack balance and the effects on corporate America.

A handful of studies, including Bardoel (2003), have sought to argue that even with family-friendly (or work/life) programs, social norms prevent their widespread use. Bardoel

used a quantitative approach to study managerial attitudes in concert with the presence of family friendly programs within organizations. Her survey of more than 1,000 respondents in Australia concluded that family-friendly policies without managerial support (through family-friendly attitudes) are not effective and are underutilized because of social mores and stigmas attached to family-friendly policies.

In an effort to better educate future business leaders (and encourage cultural change), Thompson (2002) set forth an exercise for business students devoted to work/life balance in response to what she felt was a lack of information provided in organizational behavior textbooks. The exercise was both personal and managerial in its focus and included potential questions that may be explored with participants in this study. In addition, Thompson provided case-studies, relevant literature, and other resources for the management students to whom the exercises were directed.

Another aspect explored within the corporate world was the concept of relocation and its relationship to work/life balance. (This was important to include since position hopping is not unusual in development. Typical tenures at institutions are eight years or less [Collins, 2002].) According to Bachmann (2001), work/life balance was a leading cause for relocation failures within Canada and internationally. As part of a longitudinal research study of 220 corporations and 1,500 employees, Bachmann's research illustrated that work/life issues can strongly impact individuals' decisions about considering employment change with respect to new positions in new locations. Included with the report narrative was a table (Table 3: Reasons Given for Refusal to Relocate, p. 3) indicating that 59% of respondents refused to relocate for the following three reasons: (a) spouse unwilling to leave job/career (24%), (b) reluctant to uproot children (19%), and (c) few or no work/career opportunities for spouse in

new area (16%). Bachmann utilized case-studies and policy documentation to demonstrate the need and regard for work/life balance with respect to employee relocation.

Felstead, Jewson, Phizacklea, and Walters (2002) studied work/life balance in terms of the worksite rather than relocation. Their research was conducted in the United Kingdom with a broad base of participants. Felstead et al. considered 12 theoretical hypotheses regarding the concept of “working at home” as a coping mechanism for job dissatisfaction and found that these did not pass many regression analysis tests. The quantitative design they employed also included specific definitions for concepts of work/life balance and family-friendly policy. Based upon their data collection and analysis, Felstead et al. found that working at home was not viable as a work/life balance solution.

Medicine

Stephens (1994) explored the concept of work/life balance with respect to female physicians in Wales who decided to work part-time to balance work with family. She employed a three-interview framework but had the work situations of several of her participants change throughout her study. Further, Stephens primarily focused upon the gendered aspects of the work/life imbalance for her participants which included housekeeping and childrearing issues. Stephens found that many women had difficulties managing their personal concepts of fulfillment with family and work life.

Technical Professionals

In 2002, Meiksins and Whalley conducted a ground-breaking qualitative research project with part-time technical professionals. They interviewed over 120 individuals—which they admitted were too many respondents—employed on a part-time basis (or as independent contractors) in computer science, engineering, and technical writing to study

how working less than full-time affected work/life balance. Meiksins and Whalley used a snowball sampling technique to assemble their group of respondents and selected respondents in just two metropolitan areas, Cleveland, OH and Chicago, IL because of personal limitations. Additionally, the authors stated “our priority in the interviewing was to focus on the meaning behind our respondents’ actions” (p. 15), which is a key purpose for the study of work/life balance for senior development professionals. Their findings ranged from surprised reactions by the peers of respondents to their new life choices, recommendations for those wishing to consider such moves personally (these included finding a supportive manager, talking to others in or considering the same type of work schedule, and being a valuable employee), and explaining that such part-time options were not possible in all work environments.

Law

One of the most thorough and rich sources concerning work/life balance in a high-stress environment was a study of lawyers and their continued efforts at attaining success in both their personal and professional lives. English (2003) interviewed more than 120 lawyers in a variety of employment situations in 33 states. Her work provided meaning and context for the issues of equity, time management, and stereotypes, among others. Moreover, she imparted some of the best examples of work/life interviews with male participants. What her research lacked in theoretical and methodological grounding, she compensated with the integrated voices of her participants. Some of her significant findings included the subtle discrimination against those trying to maintain balance especially in firms governed by the billable hour. These discrimination tactics ranged from losing plumb case assignments to not achieving partner status.

Education

Malnar (1996) conducted a mixed methods research study of female school district superintendents in Michigan to explore their personal and professional balance. All female school superintendents in the state were asked to complete a demographic survey (43, or 86%, completed the survey). Further, they were asked to participate in an assessment tool called the *Work Addiction Risk Test* to ascertain information concerning their work/life balance and their addiction to their occupation. Malnar then performed *t*-tests with the assessment model and determined that superintendents who have served longer are less work addicted. As this was a mixed methods study, Malnar also conducted in-depth interviews with five of her participants. They provided much research-rich information concerning their professional drive, willingness to make personal sacrifices, and their overall lack of regrets with their life choices such as turning down promotions, raising children, and delaying pleasure traveling. According to her own abstract, her main finding was that “. . . female superintendents in Michigan felt a great sense of commitment to their profession, even at the cost of their personal lives” (p. 5).

Federal Government

Saltzstein, Ting, and Saltzstein (2001) employed a new theoretical framework to analyze the *1991 Survey of Federal Government Employees* in a quantitative research design because they believed previous research had only dealt with certain work balance issues as independent variables (p. 4). Subsequently, in their survey design, they sought to find links between personal and job characteristics, employee benefit programs, job satisfaction, and satisfaction with work-life balance (p. 4). Their research observed the work attitudes of employees with respect to four main categories: (a) Job and Family Involvement, (b) Work

and Family Demands, (c) Employee Characteristics, and (d) Family-Friendly Programs and Practices. Additionally, the research indicated that although federal government employees had a number of work/life programs available to them (including, but not limited to, childcare, compressed work schedules, and flextime), these programs were well thought of but rarely utilized.

An earlier study by Bohlen and Viveros-Long (1981) also examined federal employees. Using a mixed-methods study analyzing flextime practices, they initially conducted a survey of more than 700 employees and later performed a number of follow-up interviews with respondents. Their work is among the first documented studies of work/life balance in the United States. Their conclusions recognized that workplace policy (such as flextime) and personal changes (self-concept of success) were needed to balance work and life. Bohlen and Viveros-Long found that employed parents required more flextime, that there were differing opinions on the concept of flextime, and that the expectations of defined sex-roles increased confusion (pp. 191–203).

Non-profit

Lonnquist (1995) investigated the lives of three female non-profit leaders and created a four-pronged analytical framework for study related to their leadership. The four overall prongs were: (a) organizational context, (b) leader's origins and motives, (c) socially responsible vision, and (d) organizational design and leadership processes. One of the subcomponents of the fourth prong was life balance; the others were power, decision-making, collective action, empowerment, and communication. Lonnquist utilized a comparative case-study method, which was grounded in feminist theory. She was able to use participant observation with her respondents to further elaborate upon their understandings of

their own leadership and life balance. Interestingly enough, her research showed that life balance eluded the participants in her study because of their personal and professional goals.

Higher Education

Several studies (Blank, 1981; Haper, 2000; Neal, 1991; Padulo, 2001) have been conducted within the higher education arena concerning women and work/life balance. Unfortunately, no studies of higher education subpopulations that focused exclusively on men or that were gender blind were discovered in researching this literature review.

Haper (2000) sought to explore part-time professors in the community college environment. Utilizing a qualitative framework, she conducted 19 in-depth interviews and documented recurring themes (overwork, competing priorities, guilt, etc.). Her conclusion was that part-time work is a strategy for balancing personal and professional lives for women serving on the community college faculty.

Padulo's (2001) study focused on a different dimension of higher education and a different subpopulation and utilized a different methodology. She investigated the work/life balance of 35 working mothers within student affairs departments at California institutions. Her study identified strategies for addressing work/life balance issues and for finding work environments that support balance. These strategies included speaking with supervisors, job sharing, and advocacy.

Neal (1991) researched and identified factors that enable balance between work and personal lives for female higher education administrators in the southwestern United States. Blank (1981) explored the careers and personal experiences of 14 female chief student affairs administrators in the 1970s. Her methodology was qualitative, and she explored her topic

through a feminist lens. Among her findings were that women were frustrated in their efforts to balance work and family priorities and to prevent burnout and self-neglect.

Higher Education Development

Scholarly publications about fundraising in higher education have increased within the past 15 years but are still in short supply. Among the best sources in higher education related to educational fundraising was *The Campus Green: Fund Raising in Higher Education* (Brittingham & Pezzullo, 1990). This was not a fundraising procedural guide but rather a scholarly investigation related to the implications and results of fundraising in higher education. Brittingham and Pezzullo provided research about the scope and background of fundraising, spending implications of fundraising, and a thorough discussion on donor behavior. Their findings included criticism of fundraising's influence on the academic enterprise; simply put, they outlined how fundraising was corrupting the academic fiber of institutions, how donors are engaged cursorily in the enterprise, and possible future implications to the detriment of the learning process such as course development. *The Campus Green* was one of the first scholarly works focused upon educational fundraising and remains an elemental source when discussing fundraising in higher education.

Unfortunately, Brittingham and Pezzullo did not address the roles or backgrounds of fundraisers in higher education and did not provide scholarship related to fundraising careers.

Two works have been published about the progression of fundraising within higher education. Jacobson (1990) studied institutional advancement on college campuses from 1636-1989. This study provided a review of the history of fundraising for the layperson and professional alike. Oliver (1999) organized his study as a review of historical periods and key individuals who shaped the future of fundraising. Oliver's work is by far the most

comprehensive treatment of fundraising from the individuals who created the profession to the donors who sought to support higher education institutions.

Another quality source related to fundraising in general was the volume edited by Rhodes (1997), which included chapters devoted to understanding fundraising and its implications for higher education. This book used the case study method to educate the reader about such topics as major gifts, the role of the trustees, and importance of mission driven fundraising. It did not focus upon individuals in the fundraising enterprise, but their roles and experiences were explored peripherally. Rhodes presented examples of the professionalism of the discipline as well as some discussion of job duties.

Further, there are a number of procedural publications that provided details about the fundraising enterprise. These volumes provided overall definitions for the profession and its tasks and best practices in fundraising strategy and implementation. Additionally, these publications provided legitimacy to higher education fundraising as a professional discipline. Among these volumes were those written by Buchanan (2000) and Worth (1993, 2002). Buchanan's work—a revised and updated edition of Rowland's (1986) *Handbook of Institutional Advancement*—is considered by many fundraisers as the definitive publication; the *Handbook* provides examples of fundraising situations and serves as a primary resource tool. Encompassing fundraising, alumni relations, and public relations, this large volume provided definitions for terms within the field, a theoretical framework through which the discipline can be viewed, and best practices for many advancement related activities and endeavors. Michael Worth, long-time development leader at George Washington University, has codified a number of development practices and procedures. His first book, *Educational Fund Raising* (1993), provided in-depth essays on a number of topics from fundraising ethics

to campaign planning; his second book, *New Strategies for Educational Fund Raising* (2002) covered terms and topics previously not found in the fundraising literature including accountability and donor-directed philanthropy.

Other scholarly sources solely analyzed how fundraising influences the roles of certain key administrators on campus. For example, Cook (1997) and Fisher and Quehl (1989) reviewed, studied, and analyzed how fundraising affected the roles of college and university presidents. Cook's (1997) research focused upon historical trends with respect to college presidents and their relationship to fundraising on their campuses. His work focused upon the routinization of fundraising on college campuses and possible causes including ever-increasing tuition, competition for students, and decreases in state funding. Fisher and Quehl (1989) used a theoretical framework in which they explained fundraising and the added responsibilities expected of presidents. In their edited volume, individually authored sections provide basic information on subjects ranging from public relations to planned giving at a macro level. They also explained these added duties and related fundraising terminology for the academician. Murphy (1992) explained, in *Building Bridges: Fund Raising for Deans, Faculty, and Development Officers*, the overall need for development programs on the institutional, collegiate, and departmental level. Murphy (2002) explained the importance of strategic planning, illuminated the solicitation process, and provided role definition for those participating in the development process. Hall (1993) also studied the dean's role in fundraising within the context of the overall university structure and especially in relationship to the president and the central advancement office. She found that this relationship was essential to achieve fundraising success and goal attainment. Her survey questionnaire focused upon items such as centralized and decentralized controls (reporting

and budget items). Hall contends that decentralization leads to more powerful deans who in turn understand and maneuver more effectively in their fundraising roles.

Hall (1992) also studied the structure of the advancement office and its impact upon faculty, priority selection, and fundraising success. She focused upon the evolving trend of decentralized operations—in which development officers fundraise for specific units or colleges—and how this benefits the unit/college but does not benefit the institution as a whole. Her findings included that the trend toward decentralization resulted in fiefdoms that created more competition and less collaboration for funding. Grunig (1995) also studied the trend toward decentralization and its efficiencies within doctoral institutions of higher education. Both Hall and Grunig commented upon the orientation of the development officers working in decentralized operations and how loyalty is to the college or unit rather than the development office, but little light is shed upon the work/life balance of the individuals in these positions. Caboni (2001) also investigated the structures in higher education fundraising. His research focused upon the creations of norms and expectations for individuals within organizations such as the number and frequency of donor visits, meeting attendance, solicitation procedures, and other development specific issues. Caboni concentrated on the development office as a unique culture and discussion involved sociological norms and social/cultural mores.

Also focusing upon organizational structure, Day (1998) explored and advocated for effective management practices in fundraising relating development operations to business models. His case studies, coupled with charts, checklists, and other forms, produced new scholarship as it relates to budgeting, staffing, and managing an advancement office. He further explored the roles of advancement managers within the profession. Others have

focused upon the role of the development officer or advancement manager. They include Worth and Asp (1994), Dial (1993), Conry (1998), Doonan (1993), Johnson (1996), Wright (2001), Drummond (1997), Cleveland (2003), and Carnes (1996).

Worth and Asp (1994) examined the role of the development officer in higher education, concentrating solely on the professional role. This was groundbreaking analysis of the role, the profession, and the institutional expectations for those in development, but the research appears dated (compared to others produced during the same time frame) since it does not contain information related to phone or e-mail fundraising. Drummond (1997) reviewed the “boundary spanning” roles of development officers within public higher education. Her dissertation study was qualitative, and she interviewed 13 development professionals from six states. Drummond also focused upon balance, the balance between donor’s interests and institutional needs. (Often a donor’s funding interests may not align with institutional priorities—i.e., a donor wishes to provide funding for a new academic program while the institution is attempting to raise funds to open or renovate a facility.) She focused primarily of the work role definition of development positions.

Other recent studies did not examine fundraisers as a whole but rather as subpopulations or as members in specific roles. For example, Conry (1998) studied women as development officers for the *New Directions for Philanthropic Fundraising Series*. This work provided a first glimpse of the scholarly research potential of reviewing career trends in the profession including women as the primary front-line fundraisers for institutions and those qualities women possess that make it so. Two of the leaders in the field of women’s philanthropy, Shaw-Hardy (1998) and Taylor (1998), also contributed to this volume. In independent articles each studied career choices and experiences of female development

officers. They outlined perceived glass ceilings and career patterns among the women they interacted with. Cleveland (2003) analyzed the glass-ceiling effect for women in institutional advancement at the University of Alabama. She employed a survey method to ascertain the career aspirations and road blocks of the mid-level administrators with whom she communicated. Road blocks she encountered included issues with supervisors, such as leave requests, overtime, expectations, work loads, personal choices, and lack of access to top donor prospects.

Other researchers considered the positions of chief development officers. Dial (1993) studied the role and qualifications of chief development officers at Seventh Day Adventist institutions and other religiously oriented institutions. His quantitative analysis provided little information about personal concerns, yet he did recommend future research concerning the possible relationships between fundraising success and an individual officer's length of service at a given institution. Johnson (1996) studied the practices and perceptions of chief fundraisers at community colleges in Alabama. Her research, through a quantitative methodology, sought to determine their perceptions of the resource development profession within two-year institutions. She sought answers to questions concerning the perceived needs, priorities of institutions, and their level of success. Some of her more interesting findings involved the fundraiser's self-perceptions of their success. Concentrating on a different aspect of fundraising, Wright (2001) considered the impact of institution type, endowment size, and vacancy type on recruitment of vice presidents in higher education. This quantitative study analyzed potential applicants responses. None of these studies explored the topics of work/life balance in development.

Work/life balance in development was discussed peripherally in Carnes' (1996) mixed-methods study of career perceptions and experiences of middle and senior female development officers in the Southeast. In the survey aspect of her research project, she conducted a gender-neutral study of the perceptions and attitudes of senior and middle level development officers. With her follow-up interviews, however, she elected to query 17 women about their experiences. While Carnes' study had a different goal and perspective, her interviews revealed some possible questions for exploration within this research study—questions that seek out coping mechanisms, discuss burnout, and explore working relationships as well as their current job satisfaction levels.

Work/Life Balance with Senior Advancement Professionals

As expressed in Collins (2002), demographics in higher education fundraising are changing, but little is understood with respect to the work/life balance of the individuals involved in the profession and how work/life balance issues impact senior advancement professionals. Through the literature in other professions much can be gleaned about work/life balance in high-stress environments (English, 2003), but a research study like the one proposed will investigate work/life balance in another field, one that greatly impacts the future of the American system of higher education. The research questions have not been explored in depth within any of the extant literature with respect to senior advancement professionals in public Doctoral/Research Extensive institutions of higher education. These research questions are:

1. How do the respondents conceptualize work/life balance in their lives?
2. What techniques and strategies do senior advancement professionals employ to maintain work/life balance?

3. What are the respondent perceptions of the level of effectiveness of these techniques and strategies?
4. What do the respondents recommend to the profession to promote work/life balance for development officers?

Moreover, there has been no research related to work/life balance with development officers, senior or otherwise, within any non-profit organization type. Additionally, many of the existing studies related to work/life balance have been quantitative in nature, including a number that have been cited in this literature review.

Summary

The overall components of this project have been utilized by a number of researchers focusing on work/life balance constructs in a variety of professions and frameworks. Blair-Loy (2003), Cancilla (1998), English (2003), Fletcher (2002), Lonquist (1995), Meiskins and Whalley (2002), and Stephens (1994) used qualitative approaches when studying work/life balance and its resulting issues. Several researchers including Blair-Loy, Cancilla, Fletcher, and Lonquist employed qualitative approaches to understand how their respondents made meaning of their experiences. Further, Cancilla and Stephens utilized phenomenological frameworks to examine the personal understanding of work/life balance among their respondents. Therefore, to best learn from and capitalize on these existing designs, this research project will present findings with respect to work/life balance for senior development professionals in higher education while utilizing proven methodology and existing frameworks.

CHAPTER 3

Methodology and Methods

This dissertation utilized a qualitative design structure. According to Rossman and Rallis (1998), a qualitative design “takes place in the natural world, uses multiple methods that are interactive and humanistic, is emergent rather than tightly prefigured, [and] is fundamentally interpretive” (p. 2). These four principles underscore the decision for the selection of the qualitative method for this proposed study. As was mentioned in the introduction section, recent quantitative data provided information about the general statistical composition of the development profession, but shed little light on actual issues of work/life balance and their possible and potential implications for the profession. The qualitative method allowed for investigation in a natural setting and allowed issues and concepts to emerge throughout the research process during the interviews and subsequent coding and analysis of the data.

In addition, the literature review illustrated the need for additional scholarship concerning the development profession. Further qualitative inquiry related to development professionals—specifically regarding their career choices, work/life balance, and their needs (or lack thereof) for profession-wide programming—provide new avenues for exploration and discovery within this emerging field in higher education. The context of this study shifts the lens from studying the work perspective to the entire life-view of those raising funds to support institutions of higher education.

Methodological Framework

Using a phenomenological qualitative approach, this research design yielded information that may be useful for individual development officers, institutional

advancement offices and potentially professional associations as they advocate on behalf of professionals. Further, it provided possible additional avenues for future research.

Phenomenological research in this study permitted the exploration of the work/life balance concept as a phenomenon. Crotty (2001) stated “phenomenology requires us to place our usual understanding in abeyance and have a fresh look at things” (p. 80). Seidman (1991) explained phenomenological interviewing as an approach where “interviewers use, primarily, open-ended questions. Their major task is to build upon and explore their participants’ responses to those questions. The goal is to have the participant reconstruct his or her experience within the topic under study” (p. 9). Further, Seidman contended that this approach is adaptable for a wide array of topics—especially those involving the experiences of contemporary people. Seidman further explained that this method was widely drawn from Schutz (1970). Among Schutz’s beliefs were the concepts that individuals share the same reality/experience “intersubjectively” and that individuals share the same “stock of knowledge”—common constructs of theories, ideas, and values. Schutz argued that “stocks of knowledge” “produced a familiar world, one with which members already seem acquainted” (Holstein & Gubrium, 1998, pp. 138–141).

Role of Researcher

As a development professional, I am well aware of the possible internal conflicts that the profession can place on individuals. Three years ago, I served an interim appointment for a fellow director who was on maternity leave. After returning from leave, Jane (not her real name), by her own admission, struggled with leaving her son, Austin, in daycare and her desire to stay home and raise him. This made me wonder about my own future; I had always planned to work and raise a family if given the opportunity. Four years ago, I interviewed a

senior development professional for another project. She managed her full-time work at a conservative Christian institution, while raising three sons under the age of 10. She spoke many times about balance. These issues of work/life balance are not gender specific; I have also discussed this topic with several male colleagues, including one with college-age children and another with two children under the age of three. The issues of work/life balance do not affect just those involving married individuals or those with children; recently, I have had several conversations with an unmarried colleague who has been struggling with balancing her “personal” life with her work commitments.

Throughout my professional career, I have worked with a number of men and women who travel often, work extended night and weekend hours, and attempt (many successfully) to lead productive, happy lives outside of work whether through family, community activities, or other avenues of personal fulfillment. As a single, mid-level professional with no dependents, I feel that my compassionate nature and desire to come to a better personal understanding of how I may best personally manage and integrate the concepts of work and life, provides a lens through which many others can view the topic of work/life balance in the development profession.

Research Process

This research was designed to provide a description of the phenomenon of work/life balance through the views of the participants. By utilizing a qualitative design, I gathered information to ascertain the answers to central research questions: What techniques and strategies do senior advancement professionals employ to maintain work/life balance? What is their perception of the level of effectiveness of these techniques and strategies? How can the profession change/evolve to promote work/life balance?

According to Marshall (1985, 1987), there are a number of advantages to a qualitative design. First, a qualitative design will allow for in-depth exploration of the complexities and processes of work/life balance. As work/life balance is a personal construct and perception (and varies from person to person), a qualitative design allowed for investigation of this little-known phenomenon's effect on development officers. Also, this design enabled exploration of institutional policy and how this complements the actual process of work/life balance within development offices. Next, qualitative research also focuses on the informal processes and structures in place in organizations, and for a concept such as work/life balance this focus upon the informal was critical. Qualitative research is also directed towards real goals, which is critical for work/life balance as it reflects real decisions based upon personal circumstance. Lastly, the relevant variables as they relate to development officers and work/life balance have yet to be determined (Marshall, 1985, 1987).

The framework of this research project was a phenomenological qualitative design. The project involved interviewing senior institutional advancement professionals and their experiences of work-life balance. The selection of potential respondents was achieved utilizing snowball sampling and a multiple interview protocol. (A copy of the respondent consent form and interview protocols are available in Appendices A and B, respectively.)

Respondents

The literature review has documented that as the level of responsibility increases, work/life imbalance tends to be more the norm than the exception (Blair-Loy, 2003; English, 2003). Therefore, when determining the possible respondents it was important to me that the participants reflect this overall work/life trend.

To uncover the best possible participants for the research project, snowball sampling—identifying cases of interest recommended by individuals who may know others with interesting or information-rich cases—was utilized (Miles & Huberman, 1994). The respondents for this dissertation were six senior development professionals chosen purposefully by the researcher. These individuals were selected due to their prominence in the profession and personal referrals. An effort also was made to have equal gender representation as well as the inclusion of a person of color in the interview population. As described in the introduction, a senior development professional was defined for this research study as an individual who raises funds for higher education at the director level or higher, supervises professional staff, and has served at least one non-profit institution for a period of no less than 12 years. Further, as development offices (and institutions of higher education) differ greatly, the respondents were from Carnegie Research-Extensive (formerly Research I) institutions as defined by the Carnegie Commission (2006). This selection strategy allowed for similar possible work circumstances on the part of the participants. Geographically, the participants were diverse—from urban to rural campuses within the United States. These participants varied in age, life experience, and circumstance to hopefully achieve a wide variety of responses to the interview protocol.

Data Collection

The data collection methods for this study were four-fold. First, potential participants were e-mailed by the researcher to ascertain their willingness to be interviewed and observed. Those who responded were sent a project consent form, which conformed to Iowa State University Institutional Review Board standards. The consent form is included in Appendix A. Upon return receipt of the project consent form, I contacted the proposed participant to

conduct a preliminary phone interview (see Appendix B). After completion of the phone interview, I conducted a longer, more in-depth, in-person, recorded interview. A follow-up phone interview was also conducted. Following the interview process and transcription, I sent copies of the transcribed notes for the participant's review and correction. The overall interview processes ended upon saturation of the responses of the respondents. Saturation (Lincoln & Guba, 1985) is the point when answers become redundant or repetitive with distinct respondents. No additional themes or data patterns are added by additional interviews. More information regarding the interview protocol is outlined in Appendix B. Following the interview process, the interviews were transcribed, and I wrote a report of the interviews. Then the transcripts and reports were submitted for member-checking. As defined by Lincoln and Guba (1985), member-checking is sharing the reports and transcripts with participants for them to confirm, clarify, or correct any inaccuracies.

Typically, in phenomenological interviewing (Seidman, 1991), a three-interview process is employed. Seidman postulated that a three-interview series (in person, with interviews 90 minutes in length, spaced three days-three weeks apart) would be most effective. However, with this subpopulation of individuals and their frequent meeting and travel schedules, in addition to their geographic placement around the United States, this approach would prove troublesome and not replicable in all sites and with all respondents.

Therefore, to design a process that yielded rich data and was amenable to the schedules (and consequently the participation) of the respondents, a three interview process—with two of the interviews being conducted by phone and a longer in-person interview—was planned. As Seidman (1991) articulated, “the governing principle in

designing interviewing might well be to strive for a rational process that is both repeatable and documentable” (p. 18).

Data Analysis

The data were analyzed using a number of existing qualitative data analysis methods. Marshall and Rossman (1999) stated “data analysis is the process of bringing order, structure, and interpretation to the mass of collected data . . . qualitative data analysis is a search for general statements about relationships among categories of data” (p. 150).

Using Marshall and Rossman’s (1999) construct, the analytic process that was followed for this study was: (a) organizing the data, (b) generating categories, themes, and patterns, (c) coding the data, (d) testing the emerging concepts, and (e) uncovering possible alternative explanations.

To best organize the data collected, each interview was transcribed and separated into individual computer files (see Appendix B for current interview protocol). For illustrative purposes, an interview with Sally Jones (a hypothetical respondent) was organized as follows: (a) one file for overall assessment by the researcher, (b) a file containing a summary of the initial e-mail and phone contacts, (c) write up of phone interview, (d) transcription of the in-depth personal interview, (e) write up of follow-up interview, (f) other observations, and (g) other data and/or artifacts collected by the researcher.

In efforts to generate themes, patterns, and categories, indigenous typologies and analyst-constructed typologies were utilized (Patton, 1990, pp. 306, 393–400). Marshall and Rossman (1999) explained that “indigenous typologies are those created and expressed by participants and are generated through analyses of the local use of language” (p. 154).

Therefore, terms used by the respondents were explored for internal and cross-participant

consistency and idea-generation. The analyst-constructed typologies (Marshall & Rossman) were determined by the researcher; these were themes, patterns, or categories not directly expressed by the participants.

For coding the data, I did not utilize a data coding software package, but instead utilized highlighted text to determine emerging data trends. The use of frequency counts concerning certain phrases or words was also employed. This process was changed throughout the research process as new trends or themes become apparent. Once the coding process and theme determination had begun, “the process of evaluating the plausibility of . . . developing understandings and exploring them through the data” (Marshall & Rossman, 1999, p. 157) also began. This process involved challenging the assumptions and constructs that the researcher had developed to date. For example, the work/life balance of the university president (the superior of the participants) became a discussion point early on; therefore interview questions were augmented with questions concerning the work/life balance of this individual. Further, it was during this point in the research project that alternative explanations for the emergent trends in the data were explored.

Trustworthiness

Lincoln and Guba (1985) utilized the concept of trustworthiness for validity (Seidman, 1991). They further advocated for the concepts of “credibility,” “transferability,” “dependability,” and “confirmability” in qualitative research design.

Credibility

Marshall and Rossman (1999) stated “the first is credibility, in which the goal is to demonstrate that the inquiry was conducted in such a manner to ensure that the subject was accurately identified and described” (p. 192). For this study with the limitations and

delimitations, the small group to be studied, and the numerous interviews, the data collected needed to be credible (or valid) for the population studied. Further, member checking further added to the trustworthiness and credibility of the research design. With respect to “credibility,” Lincoln and Guba (1994) outlined specific criteria which include prolonged engagement, persistent observation, triangulation, peer debriefing, and negative case analysis (p. 653).

For this study, participants were contacted no less than four times (initial e-mail contact, phone introduction, initial interview, in-depth interview, follow-up interview, and review of data collected), which took a number of weeks to complete, thereby providing the prolonged engagement and persistent observation sought by Lincoln and Guba (1994).

Triangulation was completed through the multiple types of interviews (short format, long format, etc.) and by the collection of additional data sources. In addition to the interview process, supporting documents were collected from, and reviewed with, the participants. These included job descriptions, copies of both personal and work calendars, biographies, curriculum vitas, and annual reports related to their performance. These documents were used in conjunction with the interviews to provide further insight into the work/life balance of participants. Further, these documents provided other evidence as to the trustworthiness of the data collected during the interview process.

Peer debriefing was conducted with two professional colleagues who have recently completed Ph.D. programs (one in education at William and Mary and one in sociology at Iowa State). These two professionals work in higher education fundraising, but neither was among the possible participants for the study. Therefore, they were familiar with both the subject matter and the possible issues that may surround the research project and its design.

In this study, time was built in to look for opposite cases/negative instances among the data collected. Data were constantly reviewed and rechecked for possible alternative explanations. In addition, potential negative cases were sought out through snowball sampling with other participants. By asking for referrals to professionals who meet the profile of the potential pool (that has less than 200 possible participants) who might be negative cases, it was possible to minimize this threat to the data's credibility.

Transferability

The second principle of transferability is the concept that this research will be useful to others. As stated in the introduction, there are many possible audiences for this work and opportunities for it to be applicable to other subpopulations of development officers, other non-profit managers, and others within higher education. The theoretical framework presented and the interview protocol may prove useful for researchers of other work/life balance subpopulations. Additionally, this research will be transferable to policy creation and implementation within the development office structure (Marshall & Rossman, 1999).

Dependability

Dependability, the third concept outlined by Lincoln and Guba (1985), addresses the ever changing conditions within the phenomenon to be studied and the research design. As the concept of work/life balance is fluid and elusive, it may change (and has changed over time) as documented within the literature review. Additionally, it appears to be under constant study by researchers in sociology, business, psychology, and other disciplines. Further, it is obvious that individuals will continue to strive for balance between competing demands and consequently will continue to study the phenomenon. So even as the playing field or workplace might change, this type of research study can be replicated in other

disciplines and with others in development. An audit trail (including transcripts of data, supporting documents, and dates and times of contacts) also has been maintained throughout the entire time period associated with the research project.

Confirmability

Finally, confirmability (Lincoln & Guba, 1985) is the concept that these findings could be established by a different researcher (Marshall & Rossman, 1999). Marshall and Rossman proposed a question to evaluate confirmability, “do the data help confirm the general findings and lead to the implications?” (p. 194). With the assistance of a peer debriefer and triangulation principles, this standard should be satisfied within this research construct.

Summary

The methodology for this research study about work/life balance for senior development professionals in higher education was a qualitative, phenomenological research design. The method included a three-interview protocol and was used to investigate the phenomenon of work/life balance. These interviews were conducted until theoretical saturation was achieved, and the data were coded and constant comparison methods were employed. Every effort was made to maintain the trustworthiness of data, recommendations, and conclusions.

CHAPTER 4

Research Findings

Chapters one through three provided the context and background for this study of the work/life balance of senior advancement professionals in higher education. In this chapter, I will present the findings of this research project.

Introduction of Findings

Work/life balance is a concept that has impacted the lives and careers of modern professionals. For many individuals—women and men alike—work/life balance has become the proverbial “brass ring” for which they strive in their efforts to balance family, work, and personal interests. Yet, work/life balance is not simply essential for the health and well-being of individuals but is also cost-efficient and stability-enhancing for institutions and work-environments (Perrons, 2003).

The purpose of this qualitative study was to explore the phenomenon of work/life balance through the reported experiences and reflections of a selected group of senior development professionals. By investigating this little-understood concept from the perspective of senior development professionals, the expectation was to generate potential suggestions for institutional implementation of work/life programs, and to produce ideas and strategies that could be implemented by other senior advancement professionals to improve and promote work/life balance. Further, this research project had the opportunity to identify new approaches to position retention and staffing in the field of institutional advancement.

The primary research questions to be explored were:

1. How do the respondents conceptualize work/life balance in their lives?

2. What techniques and strategies do senior advancement professionals employ to maintain work/life balance?
3. What are the respondent perceptions of the level of effectiveness of these techniques and strategies?
4. What do the respondents recommend to the profession to promote work/life balance for development officers?

The data collected from personal interviews, document review, and personal observations were analyzed and organized to present the information in a logical, suitable format.

To begin, it is important to recognize the six unique personalities of the senior advancement professionals interviewed. After presenting snapshots about the study's participants, the findings of this qualitative study are presented topically, as many similar answers were generated from different questions (see Appendix B for a list of initial, in-depth, and follow-up interview questions). Topics were divided by how they are expressed: internally or externally. Internal topics include conceptualizations and actualizations (compartmentalization, multi-dimensional, border crossing, sense of self, strengths, weaknesses, greatest success, and regrets.)

The concept of work/life balance—based upon the findings of this qualitative study—is basically an internal construct for these participants: the perception and belief of how one manages multiple demands (Kossek et al., 1999). External topics include techniques and strategies and their perceived levels of effectiveness (managing time, organization, relationship with assistant, role of spouse, role of children, mentorship, personal interests, managing e-mail, managing interruptions, managing staff, managing expectations, managing up, relationship with donors, sense of humor, and sense of self-confidence).

After discussion of both the internal and external topics, the intersection and interaction with the profession as a whole were explored. This is followed specifically by issues related to recruitment and retention strategies for advancement professionals, which are categorized and discussed separately. Throughout the chapter, differences among responses by different role identifiers (urban v. rural, male v. female, tenure in position, type of institution, etc.) are discussed to provide additional lenses through which the qualitative information may be viewed.

Study Participants

Six senior advancement professionals agreed to participate in this research study about work/life balance. The selection of the participants was through the technique of snowball sampling and began with the identification of all Carnegie Extensive Public Institutions (see Appendix C). Through this process, one participant even recommended and assisted with the cooperation of two other respondents. All were referred by other development professionals. The majority of the participants are well-known within the subpopulation. Several have won national awards for public speaking about the profession. Others added breadth and diversity of age, location, gender, experience, and number of positions to the respondent pool. With this number of participants, an equal gender distribution was achieved—thereby providing a gender-balanced research study. This is not the “typical” demographic among Vice Presidential level advancement positions within Research Extensive public higher education institutions. There are many more men than women in such positions, and present analysis indicates approximately ten men for every one woman. Additionally, with a person of color in the participant pool, this is also not typical

among vice presidents, but enhances the cross-cultural applications of this project and thickens the description and data.

As was discussed previously, the individuals interviewed were the senior development professionals at their institution of higher education. They were employed by Research Extensive Public Institutions as identified by the Carnegie Commission on Higher Education and had been employed in development at a senior position for no less than 12 years. To best understand these participants, a summary about each of them is provided. It is important to note that the research methodology which was followed for this study included pseudonyms for the participants and their institutions. (They are presented here in the order interviewed.)

Participant One

Sam Hardy. Sam is a Caucasian male in his late fifties who works as the Vice Chancellor of Development at a state flagship institution in the western United States. Sam has adult children and has been married to his current wife for more than eight years. Sam's wife is a stay-at-home spouse. This assignment is his third vice-presidential level position.

Participant Two

Derek Jones. Derek is an African-American male in his early forties who works as the Vice President for Development at an institution that is not one of its state's flagship institutions, yet still is classified as a Research Extensive Institution. This institution is coastally located in the mid-Atlantic region. Derek has a one-year-old son, and his wife is equally dedicated to her professional career. This is his first vice-presidential level position.

Participant Three

Jesse Harmon. Jesse is a Caucasian male in his early fifties who works as the Vice President for Institutional Advancement at a state flagship institution in the southeastern United States. Jesse has one daughter in college at his institution and other adult children; his wife is a stay-at-home spouse. This is his second vice-presidential level position; he has been in his current position less than one year.

Participant Four

Joan Grace. Joan is a Caucasian female in her mid-forties who works as Associate Chancellor for Development at a state flagship institution in the urban midwestern United States. Joan has one daughter in middle school. She is recently divorced; her former husband was a stay-at-home spouse. This is her first vice-presidential level position.

Participant Five

Anna Arthur. Anna is a Caucasian female in her early sixties who works as Vice President for Development at an institution that is not a state flagship institution in the midwestern United States. Anna has adult children and several grandchildren. Her husband is retired. This is her second vice-presidential level position.

Participant Six

Catherine Peacock. Catherine is a Caucasian female in her mid-forties who works as President of an institutionally-related Foundation in the rural midwestern United States. The institution that her foundation serves is the flagship institution in the state. Catherine has a stepson who is a college student at another institution and a teenage daughter. Her husband is a stay-at-home spouse. This is her second vice-presidential position; she has been in her position for less than one year.

Internal Conceptualization of Work/Life Balance

Many different examples and analogies were used to illustrate the respondents' views concerning work/life balance. Ironically, one of the most information-rich concepts came from observation of the participants. Of the participants, Anna answered that she had not achieved balance. Yet, she manages not to bring work home, never checks e-mail from home, eats well, spends quality time with her family, and exercises often. On the other hand, Joan indicated that she felt she has really achieved work/life balance. Yet, she looked quite tired and drawn during our interview and commutes about two hours each day. The purpose of sharing these examples is to drive home that the ideal and construct of work/life balance is not an external lens or view, but rather an internal one.

Not inconsequentially, much of the research conducted about work/life balance discusses how people view themselves (e.g., Blair-Loy, 2003; Levine & Pittinsky, 1997; Merrill & Merrill, 2003) and to what level they view (or achieve) balance between their work and their "life" (family, personal interests, etc.). The six senior advancement professionals with whom I interacted provided such vivid descriptions of their lives, their respective challenges, and their unique perspectives on the issues concerning work/life balance and its applications for the profession. All six respondents indicated that they have thought about work/life balance. Several indicated that it is just what they "do." They do not know another way to "be." One respondent (Catherine) laughed audibly when asked if she had thought about this issue. Jesse summed it up stating, "Well, I've thought about it just because it's an issue for anybody I think in most businesses, but particularly in our business; we can be totally consumed with the schedule and the work."

One of the more descriptive examples was Joan, who explained that she “has achieved a work/life balance, not the ideal work/life balance, but a work/life balance.” She further explained that she is not usually thinking in terms of the internal construct but more realistically and on a day-to-day application level. There appeared to be no striking differences for men and women about their conceptualization of work/life balance. Yet it did appear that the women (Anna, Catherine, and Joan) had thought about the concept in more detail throughout their lives. A case in point was Catherine’s explanation:

Well since I was sixteen (laughs) . . . really! I made career choices based on work-life balance issues. I . . . initially was thinking about medical school, and I didn’t go to med[ical] school because I didn’t think I could do that as a woman and still have a successful family. Now, I don’t think I probably would have stuck with med[ical] school anyway, but . . . [work/life balance was] very high on my radar screen.

Anna had a different view:

All [of] my working life, because I have three children; I was working when I had children; my husband traveled all the time in his job so it’s been an issue as long as I’ve been an adult with kids working in the workforce.

For all six participants, their view of their life balance had both internal and external implications. External implications will be discussed in the techniques and strategies section.

The next few sections deal with the internal issues concerning work/life balance:

compartmentalization, multi-dimensional, border crossing, sense of self, strengths, weaknesses, successes, and regrets.

Compartmentalization

As is apparent from the nature of their schedules that will be discussed in greater detail later in this chapter, for the most part, these individuals compartmentalize their lives into distinct categories when discussing the concepts of success and regret and even their overall concept of self. When asked in their phone interviews to give a 30-second elevator speech about themselves or asked about successes or regrets, several asked for clarification if this referred to a personal, professional, or another dimension. This need for clarification illustrated the multiple dimensions (compartments, if you will) through which these individuals viewed their lives—in itself, a balanced perspective—not just thinking from a work, family, or personal perspective. This compartmentalization technique was employed equally by both male and female participants in this study.

The questions concerning strengths, weaknesses, accomplishments, and regrets were open-ended, and individuals were able to take the question in any direction they chose. For several participants, these questions appeared to be the most stimulating; for this research project, their responses were among the most enlightening about how, when, and why they think about work/life balance.

Multi-dimensional

The participants in this research study did not simply view their lives in two dimensions: work or life. All viewed three dimensions at minimum as work, family, and personal, thereby indicating a visible difference between themselves and their families. For example, Sam stated:

I think the balance question . . . is more than just work or your professional life and your personal life there is . . . a number of things that, a number of roles that people

play everyday in their life; you wake up in the morning and if you're married, you have a spousal role; if you have children, you have a father role; if you have parents, then clearly you have a parental role of some type; most people have a spiritual role that they play everyday; so when you look in this whole world there are seven, eight, nine, ten roles that you have to play. Those that seem to be the most grounded are those that keep those roles in balance most of the time; and it's like a wheel on a bicycle, I think, if you spend more time professionally than you do on the other ones then that wheel becomes larger and when you then ride your bicycle you're always hitting bumps all the time. So I think you have to figure out what the roles that you must play, what are the roles that you should play, and then how do you then keep those roles in balance, and what are the things that you need to do to do that.

This multidimensional concept was presented equally by male and female participants. In fact, it was mentioned by all participants in their descriptions of self, work, and family. This concept of multi-dimensional lives relates to the earlier studies, research, and theories discussed in the literature review including, but not limited to, Moorhead and Griffin (2001); Thompson and Beauvais (2000); Kossek et al. (1999); Clark (2000); Rapoport et al. (2002); Levine and Pittinsky (1997); Blair-Loy (2003); and Bardoel (2003). Jesse encapsulated it with the following framework, "I just have to block times off [from work] to make sure I have time to do other things, fun, family, whatever." Joan added, "what I have is good balance between my work/life and my family life, but keeping that equilibrium does not leave a lot of room for personal life; that is the component that tends to be shunted aside."

Border Crossing

Clark (2000) had theorized that depending upon the individual, borders between work and family may be easy to navigate, and the daily transitions between those borders may be fluid. As with Clark's theory, these individuals do view themselves as border crossers even if they don't articulate it in the same manner. Clark framed the concept in this way:

work/family border theory is designed to focus on variables which have proved to be the most meaningful in creating understanding and change: interpersonal relationships and meaning creation, as well as structural factors like organizational policies about time and work. (p. 767)

The participants in this qualitative study described it differently. Jesse explained it:

For the most part I mean some days, some weeks are better than others, I mean yesterday I started the day with a 7:00 a.m. breakfast and got home about 8:00 p.m. . . . it's just the way it falls, some days are like that; other days are a lot more relaxed. . . .

Sense of Self

The participants in this research study had strongly developed self-concepts. This sense of self was displayed by both male and female participants. Each of the senior advancement professionals I spoke with had a high level of ego, which might be expected of someone who has attained such a position and level of success. They were quite willing to share, and each seemed to enjoy being the focus of attention. This sense of self radiated in the manner the participants carried themselves, their confidence in their opinions, belief in themselves and their abilities, and a strong concept of personal identity and what makes them unique individuals. From strengths and weaknesses to successes and regrets, the respondents

had thought about these issues and their relevant applications to their work, their family, and even their concept of balance. This sense of confidence in skills, leadership, and themselves flows forth. One telling example was shared by Derek when he was providing an answer to another question, “I’m just straightforward . . . sometimes, I’ve told a couple of deans that I thought they were useless . . .” While that might appear full of a false sense of superiority, Derek was serious and matter-of-fact in his assertion.

Strengths. The participants in this study had quick responses to questions posed about their perceived strengths. Most strengths dealt in the same realm: organization and process. This may explain and relate to their positions and the skill sets they bring to those positions as well as their perceived level of personal satisfaction. These strengths may also be related to the participants’ ability to compartmentalize and break tasks and responsibilities down into smaller portions and components. In addition, these strengths appear crucial for balance in high stress environments (Blair-Loy, 2003; English, 2003). For example, Derek considers himself:

a visionary philosopher . . . [my] strength I would say would be related to that; that I have the ability to actually see trends and predict trends, and take advantage of them. . . . my strength area is to see the big picture before most people do.

Jesse shared, “[My] biggest strengths probably are focusing, you know I can get pretty focused and make things happen . . .” Catherine stated,

I’m pretty good with big picture stuff—looking at the organizations and saying how are we doing this (laughs)—this is really important and we’re not taking care of it, or we’re doing this, but it could be a whole lot better . . . sort of over-arching

perspectives on that, and I know pretty well the steps you need to take to achieve that because I've taken a lot of those; I've had to do those through my experience.

Anna shared:

[I am] a good delegator . . . I'm intuitive, I would say that's a strength; There was . . . a profile that was done of me . . . which I [then] asked my husband if it was true and he said yes. . . . he describes me as having a piece over here and a piece over here and a piece over here and I pull them all together, and there's an idea that comes out of it that's you know that's the way you can go forward . . . so I don't know whether that's creativity or . . . synergy . . . [or] . . . something like that.

At first blush, these strengths may appear to be only work-related—delegation, vision, predicting trends, and focus. Yet, these strengths have many personal and family applications. From Derek's investment in real estate to Catherine's ability to view situations from a macro level, these strengths have many important external manifestations—with family, with work, and with personal satisfaction. As with other internal constructs, the men and women who participated in this study answered this question similarly, and strengths were shared across gender lines.

Weaknesses. Participants had more difficulty in identifying weaknesses. For example, Derek acknowledged, “My weakness is somewhat a strength, too; my weakness is sometimes I'm very blunt, I'm a straight-shooter, my donors love it because I tell them like it is.” Jesse presented his biggest weakness, which is certainly related to Derek's bluntness, differently:

My biggest weakness is probably impatience; I just don't have a lot of patience, never have. I try to work on that, I'm probably better than I used to be, but you know it's just not part of my make up so . . . I get myself in hot water or somebody's annoyed

with me it's probably because I'm being impatient, and I tend to move fast and not everybody moves that fast so therefore, that can frustrate and annoy me, so I try to keep that in mind.

Jesse's understanding of how this could affect others is critical from both a donor relationship and staff management orientation. Anna shared one of the same weaknesses: "I think the weaknesses would be impatience . . . a sense of urgency in everything I do; I want it done now, today, maybe tomorrow, but not two weeks from now, and I'm not very patient with process . . ."

The weaknesses expressed by the participants: directness (bluntness), impatience, and a sense of urgency convexly are probably a large factor in their success as development professionals. Again, weaknesses appeared to be common regardless of gender, location, age, or other factors.

Greatest success. With respect to greatest success, no less than four participants (Derek, Jesse, Catherine, and Joan) asked for clarification and compartmentalization when asked, "What is your greatest success or accomplishment?" Many were very contemplative about how they interpreted the question. Jesse's response was fairly descriptive:

I don't know, I'm the first in my family to ever go to college so you know. . . . going to college and becoming a successful professional has been pretty significant, I mean there's all kinds of work things you could talk about, any given gift, any given campaign, build this staff, do this, do that . . . there's lots of good work stuff that I'm proud of and feel good about; on the personal side, you know with the family we have, I'm proud of all that . . . so those are all good things that I'm proud of.

Derek and others reflected the question back, ". . . career-wise?" My response, "it's an

open-ended question . . .” To which Derek responded, “Career-wise was . . . three years ago, I personally raised about \$50 million dollars; one of which was a \$32 million dollar gift. . . . so that was probably the biggest one career-wise; . . . personally was probably having the baby.” Anna stated simply, “Well I think the \$100 million dollars for [my previous institution] is a huge accomplishment and we’re gonna get our \$100 million here; so in pure fundraising terms those are big successes.” After a brief pause, Catherine answered, “I think my successful life and family . . .” When observing offices, calendars, and other interactions, it is apparent that these individuals viewed their work, their families, and their personal achievements as parts of their success. From saving a cardboard box for her grandson to meeting a friend for lunch for Anna to meeting his largest donor and then spending an afternoon at home with his son Davis for Derek, these successes were compartmentalized and not surprising based upon the other answers shared by the participants.

Interestingly, individuals answered this question in the largest variety of ways—personal, professional, familial, or a combination there of; yet, achievement of balance was not among them. This concept again did not show differentiations among age, gender, or other common factors.

Regrets. When speaking of work/life balance, competing demands and interests have often led to the discussion of regrets among participants in previous research studies. The participants of this research study shared a number of regrets, but these did not appear to be of the standard variety. As with the greatest accomplishments, the participants were quite contemplative in their responses. For example, Jesse stated:

. . . this job [read: career] has taken me all over the place; good news, bad news . . . the good news is I’ve worked a lot of places and met a lot of great people, there are

some fun places and um, have friends all over the country as a result of that, you know it's a shame that I've had to travel and [take our] family away from the rest of my family, like our kids have always, our kids have never lived where their grandparents lived . . .

Derek related the story of a missed opportunity in which he could have been involved in a large scale endeavor in the hip-hop industry. He concluded, “. . . but other than that I don't have any regrets . . . and that's not really a regret, it's just probably [a] missed [opportunity] . . .”

Catherine stated, “(sigh) . . . the last 18-months at [her previous institution]. [It was] just what happened, I needed to stay to see if it could be different and it couldn't.” As the oldest of the participants, Anna was took the most time and was the most introspective in her response:

Oh I don't think there are any; I mean you always think on any given day I wish I'd done this a little differently or that a little differently, but I guess for [me], I'm pretty blessed with self-confidence enough, so that I don't beat myself up over those things. I'm hardly perfect, but I try to move on and I try and learn from the mistakes I've made.

Summary

With respect to internal constructs, the participants in this research study all had thought about work/life balance previously. It appeared that the female participants of the study began thinking about work/life issues at an earlier age than the male participants. The respondents made efforts to compartmentalize their thoughts in terms of work, family, and personal obligations and experiences; in an apparent attempt to best organize themselves. All

the participants viewed their lives in multiple dimensions that included work life, family life, and personal life; they also viewed themselves as the “border crossers” that Clark (2000) described. Respondents were asked to discuss their strengths, weaknesses, greatest successes, and regrets. There was surprising consistency among these four dimensions. Strengths revolved around organization, big picture vision, and focus. Weaknesses included impatience, bluntness, and a sense of urgency. Successes varied from dollars raised and personal accomplishment to successful families and children—representing the three dimensions through which participants viewed the concept of work/life balance. Lastly, the participants had a surprising lack of regret; their answers included staying in a position too long, missing an opportunity to network, moving around and away from extended family to none at all. Overall, the internal concepts as explained by the respondents all relate to key components outlined in Malnar’s (1996) work. The commonalities she documented were professional drive, willingness to make personal sacrifices, and lack of regrets with life choices that were echoed by participants in their descriptions related to self-actualizations about work/life balance.

Techniques and Strategies and Their Perceived Levels of Effectiveness

Related to the inner concepts about balance, the respondents were certainly forthcoming about the strategies they implement to “get everything done,” “manage themselves,” and keep perspective whether personally, with family, or with work. Many of these coping techniques and strategies emanate from the internal constructs in the previous section, specifically those related to focus, efficiency, and impatience. As Jesse indicated “I’ve literally consciously thought about balancing . . . if I don’t then my schedule will be completely filled up every single waking and sleeping moment. . . .”

The variety and depth of strategy surprised me—from appointment setting to picking up children, each of these individuals has created or developed approaches. Mundane tasks for these senior advancement professionals are not left to chance. They are ruled by their schedules, which may seem counterintuitive that the schedule seems to have its own level of control, but they have placed time, energy, and confidence in the development of these intricate systems.

Consequently, managing time and organization are the primary strategies and techniques they all mentioned and employed. These strategies look different for each of them as will be discussed in greater detail. Other critical strategies and techniques to maintain balance center around the following concepts: relationship with assistant, role of spouse, role of children, mentorship, personal interests, managing e-mail, managing interruptions, managing staff, managing expectations, managing up, relationship with donors, sense of humor, and sense of self-confidence. After the discussion of the individual strategies, the concept of effectiveness will be explored.

Managing Time

As part of this project, in addition to following the interview protocol, I reviewed the calendars of selected participants for a specific period of time. Due to the nature of the positions, it did not surprise me to see the sheer number of appointments—including double and triple booked ones—on the calendars of these individuals.

It was apparent that the participants viewed time as their most precious commodity. Their strategies varied for best managing it, from Sam who shared:

[I guard it] like a Gestapo (laughs)! I am a stickler on my time. First I sit down usually three to four to five months in advance of the new year and do a self-retreat,

I'll go away for two days just by myself and determine what I think are the greatest priorities of the organization for that coming year, and then I determine where I think I can add the greatest value, and I only pick three [to concentrate on].

Catherine explained some of her strategies differently, but just as firmly:

. . . I think about it consciously a lot. I think about it in terms of the meal times [and] trying to not do work things on Sundays. I don't take work home at night; I'll check my e-mail at night and in the morning, but [I] probably don't work in my house three hours a week. Now I work 60-70-80 hours a week, but I really try not to do it in the house. I don't come in on weekends, I mean there's enough social stuff, there [are] enough events, there [are] enough functions that if I don't get it done between 7:00 a.m. and 6:00 p.m., it just waits.

Anna was more matter of fact in her explanation stating:

. . . currently I get up at 5:30 in the morning [and] I do my exercises, I eat my breakfast [and] I'm here at 8:00. I'm scheduled like a crazy person all day . . . I leave here at 6:00 at night; I go home; I have dinner with my husband [and] I'm in bed by 9:00 with the light off.

As the oldest participant in the study, Anna shared that her current position (and consequently her work/life balance) may be easier to manage if she was 40—actually stating that she had less stamina at her age.

Key commonalities among the participants included: schedulers, a unified calendar, a willingness to schedule mundane tasks, and efficient use of small bits of time.

All employed schedulers—typically executive assistants and/or other office support staff—and rarely scheduled their own appointments. (Derek was an exception in this case as

his assistant had recently left the organization, but this was his standard operating procedure as well.) Anna does check corporate calendar (or the real-time shared calendar utilized by her office and her campus) though and may invite staff to a meeting, but also stated, “but [my assistant’s] awfully good at figuring out whether it’s something I really want to do or not.”

Catherine added:

I’ve got a person who’s been at the foundation for thirty years who’s making all my appointments for me right now basically to help me get acquainted with the board members and the right people, the key prospects. . . . I’m not the one making the phone calls anymore to get all of the appointments for next week in Arizona, I just show up. So having that kind of support is huge, it’s just huge . . .

These schedules, whether printed on paper or managed by a Blackberry or a Treo, are reviewed constantly. The schedulers are also comfortable functioning in their role as a gatekeeper for access to the individual.

The concept of a unified calendar is simply maintaining one record of all activities—personal, work, civic, etc. Due to the nature of advancement and its frequent night and weekend activities, the unified calendar optimizes organization and efficiency (two key strengths of the participants). Jesse provided a vivid description of how he views scheduling:

. . . in my mind, again, my entire world is one big schedule, there are 24-hours in the day, seven days a week; so the whole world in my mind is this big grid so I just schedule, whether it’s work or, well . . . home time or go out and play time or sleep time or whatever . . . it’s just how it has to be.

These senior advancement professionals also tended to view work and personal time as having fluid boundaries. They are not afraid to schedule personal time in the middle of the

afternoon; this is regardless of gender, age, or other defining characteristic. Two great examples come from Jesse and Catherine, the two senior advancement professionals with the shortest tenures in their current positions. Jesse asserted:

24-hours; I can work or play anytime (laughs). So I do tons of early mornings . . . tons of night stuff so you know, if I want to go have lunch with my wife or my daughter that goes to school here or go get a hair cut at 3:00 or something, you know that's [alright].

Catherine explained when reviewing her calendar with me:

There is a tiny little management thing, I did go to get a pedicure this afternoon (laughs). And I've done that for years, I mean you know when you're . . . [scheduled this much]. And these happen to be two weeks when I wasn't traveling. You know, I was gone Monday through Friday last week and I worked until 10:00 every night of the week, so I'm not going to worry about leaving for an hour to get a hair cut [or a pedicure].

She also keeps an odd, rotating schedule due to her commitment to taking her daughter to school:

. . . [Her schedule is a] six-day rotation, so days one and four . . . she has early jazz at 7:00—so on days one and four whenever those fall, they're not on the same day of the week—I'm usually here by five past 7:00; the rest of the time I take her to school, and she can't really be there much before 8:00, so I'm usually here at 8:00 or five past 8:00. . . .

This willingness to schedule personal appointments and family commitments during working hours presents an applicable concept for this research project. First, these individuals are

willing to assert their need to balance competing demands upon their time and are willing to (sometimes) select personal or family options over work ones. This implies balance as they are not always foregoing family or personal demands for work ones.

These individuals will also put everyday tasks on their calendars—from pre-work to follow-up, it appears on a schedule. As Sam said, “we’ve just worked through that whole process; nobody gets on the calendar now because everything that is on my calendar is a priority . . .” With the importance of efficiency and order, it appears to flow from the strengths of the participants. As Jesse said:

First of all, I think that it’s a conscious effort [to schedule], so it’s not just, let’s see what happens. I mean in my mind I try to be as methodical as [this] business will allow . . . so I try to schedule things. That’s what I do about it. I think the techniques are just literally that using the tools and the people we have to schedule appropriately so...it’s just a scheduling issue. . . . I mean I will literally schedule, for example, if I’ve got an upcoming presentation to make someplace I will schedule, on my calendar [pre-work].

Joan works with her assistant to keep her Fridays clear so that she can best manage her time and avoid coming in on the weekends. Sam is much more rigid in his approach, but attempts to reach a similar outcome:

I then sit down with my assistant and then we map out the calendar for the entire year so my calendar is blocked out a year in advance and there is prep time, there is travel time, there is meeting time, there is debrief time, there is follow-up time all plugged into my calendar a year in advance for all meetings.

In addition to adding mundane tasks, these individuals will use little snippets of time to be as efficient and focused as possible. Anna illustrated her strategy in this way:

Well, I come in, I look at my little To Do list, I say okay I've starred the ones that need to be done today; I work my way through that, [and] I try to find some time to do something that requires more than ten seconds worth of time . . . because I've got projects that need to be done: I had a letter to write to a donor I've been working with who's considering an annuity and he can't sort of decide what to do with it, I have a donor who's coming in next week and he wanted a vision statement . . . Ohmigod! you can't do that in five minutes! . . . so it's those things and I tend to do those either early in the day, or late in the day.

Jesse explained the strategy similarly:

So, for example, if I'm gonna block an hour and work on a presentation of the board, on my calendar it looks like a meeting. . . . Don't schedule anything else, I'm gonna work on that for an hour and in that hour that's what I'm gonna do is work on getting that done. Not . . . make phone calls or check CNN.com and see what's on. . . . [There is] focus and discipline to do that.

Additionally, there appeared to be no distinct differences among any of the subpopulations of the study. All valued time management as a crucial component of their success. These time management strategies—employing a scheduler, having a unified calendar, and utilizing small pieces of time—also dovetail with another key strategy employed by the respondents: organization.

Organization

The participants for this project have created systems and processes through which they seek to get the most done in the most efficient manner possible. These efficiencies are not simply just with respect to work, but are evident in how they structure their thoughts and even their free time. With respect to office time, Jesse explained it:

Well . . . back to the focus that I talked about earlier, I try to be focused because it's effective and efficient so you know I consciously try not to be too short with my staff if they come in . . . but at the same time you know we probably got a finite [period of time], we've got 30 minutes to deal with an issue and it's really sincerely going to take us a good 25 minutes of hard work to get it done, that means we've got a five minute [window for small talk] . . . so you know it's not that I don't care, I'm not interested, I'd love to just talk about the ball game last night, it's fun for me too but that's not what we're here to do. So I think, I really try to compartmentalize and not think about [other things].

These organizational strategies differ for each individual. There also does not appear to be one "right" or universal answer for organizing tasks, yet each participant appeared to have one. This follows closely with the internal constructs and how each perceives work/life balance. Anna provided some overall examples about process and organization:

I try really hard not to do it; I'd much rather come in here to do it, this weekend I had a meeting Monday morning I wanted to think about it, so I took it home and Monday morning I got up even earlier and I read it through and thought about how am I gonna say this, what's the point gonna be . . .

Anna also spoke about just the process she follows: “Well I come in, I look at my little to do list, [and] I say okay I’ve starred the ones that need to be done today, [and then] I work my way through that.” She followed up these comments by speaking about delegation:

I think I’m a good delegator um, I’ve always been teased if I work over a stretch of time where people aren’t in the office . . . like if I work the Christmas holidays where a lot of people are off or a week during the summer where a lot of people are off, I clean my files, I say here’s the projects when you come back from your vacation you gotta file on your chair of stuff I’m delegating (laughs) to you.

Anna’s examples of delegation, to-do lists, prioritization, and thinking about work projects provide a clear view of her organizational skills. These are not simply unique to Anna, but appear to be necessary external strategies for organization for senior advancement professionals. Overall, Jesse summed up this work organization strategy well in this manner:

Well, I think that’s where people [in this] business fall down—probably all businesses—but if you’re traveling for a week, you should be generating an awful lot of follow-up, and if you don’t have time to do that follow-up, what do you think you’re gonna do? . . . if I’m making a donor visit, when I walk out of that place I’m probably dictating my report non-stop, you know I don’t wait until I get home three days later . . . I’m doing it on the spot, right, as fast as I can, not only because it’s, the longer you wait, every minute you wait you probably lose things—sort of a retention issue, but it’s also just the [effective] use of time: I’m gonna get it done, get it out, might review it, or edit it, or something later, but get it done fast.

There appeared to be little differentiation based upon age, location, gender or other identifying characteristics in how they organize. For these individuals, getting projects completed, reviewed, and done fast in a methodical manner appear to be critical skills.

Relationship with Assistant

Each and every respondent shared the critical nature of having a great assistant. In fact, Derek was lamenting the loss of his assistant during our in-person interview. The compensation packages at his particular institution made it very difficult to retain qualified professionals. These assistants were viewed as extremely critical team members. Joan, for example, gushed:

Truly, from our first conversation, we were meant to be! . . . Clearly we have the same type of temperament. . . . All my years of bad assistants, I was just paying my dues so that I could work with him. I could not do this job the way I do if I did not have such a good assistant.

Sam indicated that his assistant is indispensable. She even calls in while on vacation, and she is responsible for training the interim assistant as well. These assistants appear to share administrative strengths including organization and process. Additionally, the synergy between assistant and senior advancement professional looked critical as well. With respect to this project, I spoke with all of the assistants (including Derek's), and all seemed thoroughly aware of their supervisors' schedules and idiosyncrasies.

One key difference appeared to manifest across the issue of institution size and administrative support. Those at the largest institutions seemed to have access to much more clerical and administrative support. Catherine explained:

. . . in some ways I feel like it's as good now as it's ever been; part of that is as a result of the support I have here in terms of exceptionally competent staff . . . I've got more clerical support than I've ever had in my life; they're better than they've ever been at this level.

When asked if it was competency or quantity, Catherine replied, "I think it's both. (long pause) . . . It's really both." Her experience was echoed by Jesse and Sam. They both had access to multiple assistants who managed their calendars and other work. While those at larger institutions had many individuals to support them and their efforts, those at institutions with smaller advancement organizations typically shared their executive assistant with other staff members. Jesse mentioned that, prior to leaving, Lauren assisted him and the associate vice presidents. This did not mean assistants at smaller institutions were less important, but were simply in shorter supply. As Anna explained:

I had a rocky start here; [Jennifer] has been here maybe a year-and-a-half. There was no secretary here; I had a temporary for awhile . . . they gave me somebody who would hang up on people that she didn't like. I mean you can't imagine anything as bad as this! And no help, I mean nobody said "gosh this isn't working for you, is it?" And so finally through my persistence I said, "I need somebody, and you gotta help me find [someone], so when she walked in the door I thought this will work and I think she feels the same way; she'd been beaten up pretty bad in the physics department, and she was happy to find some place that would appreciate her, and we all appreciate her. Anybody that needs her can [use] her, we have another secretary who we just lost, and we will replace [her], but Sue acts as the major-domo, the mom, the scheduler, and the party person.

The effective use of administrative support is a critical work/life balance strategy for the participants. The duties of these administrative professionals vary, but two key components are serving as a gatekeeper and serving as a scheduler in addition to having synergy with the senior advancement professional.

Two participants mentioned a specific strategy they employ with their assistants: a standing daily meeting. Catherine expanded on this:

Kelly, my assistant, we try to get together every day at 4:30. That's the goal. She . . . suggested bringing in the mail every afternoon, and I said well let's just try to hold 30 minutes every afternoon and it does work [for us].

Joan has a daily morning meeting with her assistant via phone during her typically 90 minute commute. She finds this very productive, uninterrupted work time. This coping mechanism may, or many not, be effective and efficient for other professionals in advancement.

Role of Spouse

Throughout this project, there were a number of surprising findings. While it was known to the researcher that most senior advancement professionals have life partners, one surprising finding of this research study was that four of six participants had stay-at-home spouses: two women and two men. Further, Joan did have a stay-at-home-spouse until she divorced the previous year. Jesse and his wife both worked full-time high-powered positions and employed a full-time nanny, yet with Davis being less than one year old, they are still negotiating scheduling and family roles. This concept of a stay-at-home spouse was surprising in that it was consistent regardless of the age of children.

As the oldest participant, Anna's explanation of her thoughts and her (adult) children's thoughts on the subject of women as primary breadwinners were more revealing for the differences they illustrated:

It was very interesting then there was an article in the [*New York Times*] last week which I ripped out for my kids because I thought it was so fascinating, and Mark [my husband] and I had a long conversation about it because it was about the wife being the breadwinner—which I am currently through my choice, but that's the situation—and this generation has just shifted, so I showed it to my daughters-in-law and my daughter—they were all out for lunch on Sunday—and they said, “so, big whoop!” Catherine, who is 45, explained her work/life balance (and her husband's role in it) this way:

Well maybe the best way to say it is it's been a heckuva lot easier since my husband's been an at-home dad, because he's very deliberate about taking care of home chores, shopping, house cleaning . . . worrying about school stuff, doctor's appointments, sick kids . . . and he's been home for almost 11 years [since our daughter was 2].

Derek was the only participant who was single with no dependents for a long period of time while vice-president; it appeared that his balance was worse then:

Before I got married in '99, it didn't matter I mean my whole life was [work]; I was single [and] I was here all the time and the president required us to be here all the time; once I got married—I think I told you—I started backing off . . .

so it would be hard to draw conclusions related to single professionals without dependents.

Joan provided a number of thoughts to explore as her role as a bread-winner wife with a stay-at-home husband has shifted with her recent separation and divorce. Joan stated:

One of the things that worked well about our marriage was . . . the non-gender role traditional balance of responsibility in our relationship. My ex-husband always wanted to be a father; he'd always wanted to be a stay-at-home father . . .

It is important to remember that senior advancement professionals have many night and weekend responsibilities including dinners with donors, campus performances, and athletic events. Further, university advancement positions also require frequent business travel. Participants shared some interesting perspectives (of their own and their spouses) about both. Jesse shared:

Yeah, I mean it's, for many years, I missed every Valentine's Day—for years and years—just because particularly in [the Upper Midwest] years because we would follow our snowbirds in January, February, March even into April; we were really on the road a lot so I was never home for a Valentine's Day.

Catherine also stated that she does not bring her husband with her on business trips (which appears commonplace for senior level administrators):

I don't feel like I do very well is (work) travel with my spouse; it doesn't work very well for us and that's not a reflection on our marriage, it's just a reflection on [how] we do things—I mean, I can imagine some people saying their spouse travels with them—[it] . . . doesn't work for us, that's not a way that [we] balance. . . .

For example, when asked if checking e-mail from home is time spent working, Catherine responded, “Yeah, my husband certainly does,” which implied that her husband's perspective on balance mattered just as much as her own in this case. Spousal opinion and comfort level with the work of the participants appeared critical specifically due to the all-encompassing

nature of the position. Anna provided a great summary of this phenomenon of one spouse having a more demanding position:

Well, I guess I thought years ago about the work-life balance and observed it, particularly when my husband was traveling all the time and observed other couples and in those days I thought my job had to be the backseat because he had no flexibility in his job so and as I observed other couples, I observed the same thing: one partner had a less demanding job while the other one had a very demanding job and I still think that's true. What's kind of interesting is it's flipped you know he's the one with flexibility, he's doing very interesting volunteer stuff but as I was leaving the house this morning, [I asked] can you pick up the Mary Poppins video for [grandson] Jackson (laughs). . . .

When explaining the scope of his work and how it affects balance in his life with his spouse, Jesse shared:

So it's not like I'm a workaholic that my wife said one day, 'Hey, you'd better back off, or go find some other place to live!' so therefore you tweak your lifestyle, that's not the case I mean it's just, that's just kinda how I am.

Jesse's view was not atypical from other participants. That is not to say this dynamic of high-powered spouse does not present some challenges for the spouses of participants specifically in terms of public identity. As Anna continued her example, she provided some explanation of the construct:

[the roles have] flipped and that's not without some angst on our part . . . recently we were standing and talking to somebody at a basketball game, and he said, "that person looks to you, they don't look to me"—and it's a faculty member here—and I said,

“Really, I didn’t notice that,” . . . I said, “do you think that was true when you had the high powered job and I didn’t?” He said, “Yeah, probably.”

Catherine was more direct and humorous in her depiction: “[At] work [events] when he feels like he’s arm-candy, as he says.” This concept of spousal role could indeed be explored in greater detail and is recommended for future research. Certainly more could be studied about how striving to achieve work/life balance affects spousal relationships. But as a finding of this study, the stay-at-home role of the spouses appears critical for balance maintenance.

Role of Children

Three of the participants had children in the home: Catherine (a teenaged daughter, Dani), Joan (a teenaged daughter, Brianna), and Derek (an infant son, Davis). Jesse had a college-aged daughter who attended the institution for which he works, and Catherine has a college-aged stepson who attends an institution in another state. Jesse, Sam, and Anna all have adult children. With the information that the participants shared, children and their activities appear to promote, rather than hinder, work/life balance—whether in the children still live at home or not. Derek’s explanations about the shifts in his priorities since Davis’ birth support this, but further research with childless advancement professionals might provide more insight.

Catherine’s description of her family echoes this sentiment of balance being promoted by children:

I think when we think about balance it’s different things . . . our family I think has—I don’t think of it in terms of myself—our family has chosen to try to achieve balance by my husband being an at-home dad, so as an example I take our daughter to school

every morning, he picks her up every afternoon because we don't have bus service where we are. I'm usually home by 6:00, we always have breakfast and supper together . . . if I'm at all able to do that . . . go to church together every week . . . we really kind of try to be disciplined about ritual sorts of things. . . .

As a brand-new parent, Derek is still learning and adjusting his schedule accordingly.

It was apparent from our conversations that he had given much recent thought to the subject:

. . . when we started talking about having a child I'm like well how much time am I gonna spend with my child; so I think about it every time . . . completely balanced like today, I leave today after a 2:00 meeting; I'll go home and spend time with my son, play with him and hold him. I rotate. Yep every other Wednesday and every other Thursday so . . . but I think about it . . . [for example] I've cut out tonight with the chairman. . . .

Derek indicated that he learned some critical skills from observing and discussing family with one of his largest donors:

Most of them tell me to cherish it now that you have a baby but for the most part, two conversations and a father and son told me in Florida one week the biggest mistake he ever made in his life was not spending time with his children and he was too focused on work and what not and he said he would never advise anybody to put work first the way he did, and then seeing his son Braeden . . . now and talking to [the donor] about the fact that his father wasn't there growing up, his mom was there quite a bit but not his dad and he made a commitment to his family, you won't see Braeden at events in the evening or weekends, he spends it with his family and so I learned

that years ago, and said that's what I want to do if I ever have children. My wife and I had a good understanding [about that] . . .

As a parent with adult children, Sam explained how he still seeks to maintain those relationships:

I love to spend as much time as I can with Angie and my children and to do things with them; they're a little distance away my daughter's in [another state] and my son is in [another state], now so I talk with them every week and then we try to kinda catch up with them as often as we can but . . . I like to spend time with them when we have the time to do it but that's always kind of a precious quantity . . .

Jesse spoke about balancing his work and family demands when he was a younger professional as well:

. . . sometimes kids' birthdays or something . . . we may or may not have a big birthday party on the day, it might be the next day or the day after, some of those kinds of things. . . . other things too . . . leave work early . . . to go to a school play or a concert. . . . you just kinda try to balance it all out . . .

The joy, affection, and smiles (even exasperated ones for those with teenagers) came to the faces of the participants as they talked openly about these relationships and the importance they have. As Catherine shared when asked about her favorites activities:

. . . well you know that's not completely fair to a mom. Obviously spending time with my daughter is a super high priority. . . . Probably my favorite thing outside work would be traveling with my family. . . . what I do, I guess the other thing is that especially with Dani, our daughter, at the age she is, we are headed to Costa Rica for spring break; she and I are headed to Germany for two weeks in July; I'm trying to be

deliberate about taking time away for family vacations while she's still living at home.

Joan added that she "places an absolute priority on family over work, so it is not negotiable to miss my child's performances . . . she takes that stand . . . it's my child."

The role of children may appear counterintuitive as a coping mechanism, but it appears from the discussions with the participants that children (and grandchildren) bring vibrancy and joy and an added dimension to the work/life balance paradigm.

Mentorship

Another surprising finding was the role mentoring and modeling played in the everyday work-experiences of the participants. This mentorship and modeling was not necessarily hand-holding, but more "sink or swim" and learn as you go. Yet, the desire and ability to encourage and promote leadership from their subordinates appeared to be universal. (This mentorship construct is differentiated from managing staff.)

Derek was pretty direct in his description:

. . . I'm not gonna be here because I pay too many people a lot of money and I think they can handle it; if they can't handle it, I want to know whether they can or can't, because there may be a day when I'm gone. One of my biggest responsibilities outside, you're talking about balance is also balance here and making sure that people who work under me can take my place . . . The president may say why weren't you there, [and] I'll say look, they've gotta grow up and get handle on these things . . .

Across the country, Sam echoed the same sentiment:

. . . Everybody has a big piece and everybody carries a big load and they do what they need to do in order for us to be successful, but they're all carrying very big loads all

the time and I really believe in giving people lots of things on their plate, usually two or three things that they're probably not ready for or not capable of right now and good people always rise to the top and they always try to struggle through it and get through it and they emerge on the other side saying, "I didn't know that I could do that, but I did it" and then I give them more (laughing).

Anna indicated that she enjoys mentoring younger employees and illustrated that she has high standards. Yet, she also shared:

. . . our staff here is so young that since I started I've always had an open door so they come in and out, I think they need a lot of guidance; they don't have a sort of bag of tricks to pull from . . .

This concept of mentoring—grooming the next generation of advancement leaders—is critical based upon the issues in the profession for recruitment and retention. It is also apparent that the delegation that comes from mentoring (the handing off of key prospects and projects) is also a balance strategy for the senior advancement professionals.

Personal Interests

Personal interests were one of the most surprising coping strategies that presented through the interviews with the participants. These interests fall outside of the work realm and are also not family related. This question provided more insight regarding the multiple dimensions through which respondents viewed the balance construct. Finding time for personal activities seemed to encompass a critical level of personal satisfaction. For all participants, these hobbies appear to bring personal joy and, for some, peaceful relaxation.

Like the variety of personal histories, the hobbies vary greatly. For example, Catherine is learning to play the piano; Derek enjoys boating and writing mystery fiction;

Sam enjoys golf and just reading by the beach; Joan creates mosaics on a fairly regular basis; Anna has a passion for exercise including triathlons; and Jesse takes pleasure in scuba diving and playing golf. Ironically, all of the favorite hobbies of these senior advancement professionals are individual activities as opposed to large group or team activities. Each of the activities appears to bring a sense of calm and meditation to the respective individuals while providing a challenge outside of work and family responsibilities. Catherine elucidated:

. . . playing the piano for me is an emotional expression. . . . it's . . . discipline that almost guarantees success all right if you practice enough you will get better, Life is not necessarily like that (laughs) so I know if I practice an hour five days a week I'm going to be better next week than I was last week . . . it's hard enough work that then you don't think about other problems or issues. I think all of us probably need some of that personal time and whether you take the hour that you try to carve out every day for practicing the piano, or for exercise, or for meditation, or for you know whatever, I do think as humans we need something for ourselves, because in many ways the family is also a demand, right? I mean you've got all these demands at work that keep you from even eating (laughs), and then you go home and your thirteen-year-old's throwing a fit because . . .

Anna was just matter of fact about her need to take some time out and recharge:

“[sometimes] I gotta lay on the couch and read a book!” These personal interests again appear to provide a concrete strategy for work/life balance for the participants.

Managing E-mail

One of the most critical coping mechanisms shared by the respondents was how they managed to effectively review e-mail communications. The strategies were not necessarily related, but each individual had a set strategy for managing the vast numbers of e-mails they receive on a daily basis. Sam's strategy, for example, was to wait and handle it all later in the evening, but not to leave any for the next day. In his own words:

. . . I never do e-mail during the day ever. Rarely ever do I do e-mail. I get about 100 e-mails a day and do them every night between 6:00 and 8:00 usually; unless we have a night function and then it's between 10:00 and midnight. I always clean out my e-mail every night and do them all before I go to bed so everybody always has a one day turn-around time with me.

Jesse employs a similar strategy:

I try to make it a rule, no matter where I am, I hardly ever go to bed without having every e-mail I've received that day done, so you know I might be watching a ball game doing e-mails, am I relaxing and watching a ball game or am I doing e-mails? . . . I'm doing both. I always have my laptop with me, always uh, when I'm traveling or every single night you know I take it home, that's when I do e-mail, I usually do e-mail at home on my laptop, I use this thing, I use this [Treo] to kinda keep on top of things, as far as really responding and corresponding I just save that for later and do it on my laptop, so it actually speeds things up a lot of times, I've maybe have read the e-mails but haven't responded yet but if I'm sitting at home, instead of watching a ball game or a movie or something, I'll do an e-mail.

Catherine and Joan also respond to their e-mails at night. Anna prefers to leave hers at the office stating, “I’d rather stay here until 7:00 at night and get it done here, I mean I’ll come in on a Saturday once in awhile, but I really resist that.”

Again, it appears that efficiency is paramount when handling e-mails. For most of the participants this means handling them all at once at a designated time and only following up with critical e-mails (delivered usually via a handheld device) if necessary during the heart of the work day. Jesse even stated that succinctness in e-mails is crucial for him:

That’s the thing my folks, for years, have laughed about or joked with me about is they’re gonna send me an e-mail with something, and they’re gonna make sure to put whatever the real issue is in the first sentence, because I may not get to it (laughs). . . .

Based upon the sheer volume of e-mails, it appears that strict inbox management is a necessary strategy for success (and consequently, the work/life balance of the participants).

Managing Interruptions

Each participant seemed to have a handful of other strategies that they employed to manage interruptions (and thereby manage their time most efficiently). For example, Sam rarely takes phone calls. He explains his rationale this way:

I rarely ever return calls but calls that I get I always e-mail those people at night and say I got your call, I’ve been in meetings most of the day is there something that I can help you with or if you kind of give me more information maybe I can get somebody else to help you . . .

This is his strategy to best avoid this interruption to his day—for good or for bad. Joan manages her phone calls differently, but still attempts not to let them interrupt her work day.

She makes and returns calls during her daily (sometimes) two-hour commute. As she stated, “My commute is very carefully planned every day. I use my commute time . . . strategically. . . . it is the time [my assistant] and I get our business done.” Catherine also uses her drive time (her commute is ten minutes) to manage phone calls. Yet, the calls she manages are not work related. As she puts it, “it’s part of my balance time I call my parents, I call my girlfriends, even if I know that they’re not going to be there I just [call]and leave them a message . . . I call my stepson. . . .”

Again this strategy of managing interruptions (illustrated here by managing phone calls) appears to be critical for the participants as they seek to maintain work/life balance.

Managing Staff

One of the most time-consuming endeavors of the senior advancement professionals is staff management. The participants varied upon the enjoyment that they viewed from this strategy. While sharing her calendar, Catherine pointed out delivering new name badges to each of her organization’s 150 employees. While she viewed it as time well-spent, this process took an hour and one half from her already full day. On the opposite side of the issue is Sam. He detests staff management, so he delegates it. He describes his designee as:

. . . very mature, very sophisticated, understands people, and so I tell him, call him every other day and say I’m thinking about this, what do you think, so I’m seeking his advice and counsel he is the guy that’s setting the tone for our entire organization of how to manage people . . .

Yet, whether they like it or not, they view staff management as mission critical to accomplishing goals and leading a successful organization.

All of the senior advancement professionals seemed willing to employ strategies to manage the work/life balance of their employees (to improve morale, retain key staff, and improve organizational productivity). For example, Anna shared a recent story about flexibility with her employee, Annette:

I think they view me as very supportive of that, one of our employees who works part-time has two little kids one with some developmental delays. I did her review the other day which is what makes me think of that, her mother who . . . who was, is Annette's, was Annette's sole responsibility went through a long illness and finally died and I said to her, this was six weeks, don't come to work, don't call me, just take the time you need to take care of your mom, she thanked me profusely for that and she asked me if she could work four days instead of five, fine with me, we have another employee that's got three little kids, so she said to me and I suggested to her supervisor why don't you ask Nancy if it would be easier for her if she worked four full days and have a day off.

The opinions of the respondents were that if they can foster work/life balance while improving the productivity of the organization that this is a win-win scenario for them. Joan cited an example of an employee with a young baby at home who works 6:30 a.m. to 2:45 p.m. every day. "It works for her and due to the nature of her job...it works [for us]." As Derek shared:

I'm not a stickler about when you get in, I'm a stickler about what you get done . . . I think [one, I] set an example and two, I give my people flex hours because we do a lot of stuff.

Catherine also stated, “. . . well, I do think it’s important to encourage our staff to take their vacations, to be here and to work as hard as they can while they’re here but then to go home . . . ”

When asked about his staff management skills, Jesse stated:

I think that’s worked out well. I think I’m pretty flexible [that] I can work with a lot of different styles, a lot of different types of people . . . I think it’s important to be able to recognize styles, different types of people . . . I think I’ve always been very respectful of people if they need to go take their kid to the doctor or go to that dance recital too, I mean I’ve been through that, my kids are older, my youngest is going to college here so those two are out, so I’ve been there, done that and have an appreciation for it . . .

From the examples provided by the respondents, it is clear that work/life balance is a lens through which they view staff management. Further, it is also apparent that effective staff management—whether personally or through delegation—is an essential technique.

Managing Expectations

Another technique and strategy for maintaining work/life balance among the senior advancement respondents was managing the expectations of others, specifically with respect to those expecting these individuals to raise additional funds. As Sam put it:

Very stressful, I mean the jobs that we have are very complex, very difficult, very demanding, very high expectations. Everybody believes that they can come in and talk with you and you can deliver big gifts for them tomorrow . . . so I would say on a scale of 1–10, the pressure, the intensity and the rest is probably [an] 8 [or a] 9 and then the question is how do you handle it or how do you manage it.

Jesse's self-deprecating humor showed through his analysis of managing the expectations placed upon him:

I'm pretty, pretty dedicated to accomplishing my mission, whatever the mission is.

I'm gonna get it done one way or another and I think, I think I've been fortunate to be able to do that in a good way without um, you know hurting people or being a bull in a China shop or anything of that, not screaming, yelling, scaring people to death . . .

Anna was more self-reflective about expectations as the expectations she was having difficulty managing initially appeared to be her own:

I don't know whether it's the strangeness of academia which I think is really strange or the size of the organization that made this so difficult to get that or my own expectations of what I thought my own performance ought to be.

Based upon the interviews conducted for this project, it appears that managing expectations is imperative for these senior advancement professionals. Sam's overall thoughts on this issue were quite revealing:

I think that there is a sense of ambiguity that people in these positions have to develop, it's a sense of grayness, there's a sense of resiliency that you never get too high in celebration of a \$50 million dollar gift and you never get too low when your very best fundraiser has decided to leave, there is a middle of the road that you have to stay, I think, and when you celebrate, you pop up a little bit and you celebrate and you say way to go and when it's down you drop down a little bit and you say, "oh man, that's not good" (laughs) and you figure out a strategy and you pop it right back up and you just keep right on going, you can't get too high and you can't get too low, you can never lose site of what the prize is, what you're trying to do and you get up

everyday and you keep your eye on that prize and you don't let all this noise on both sides distract you, and so that's kind of what I tried to do the last 10, 15 years is early in my career I'd get really high on things and then when we would lose a proposal or we'd lose a development officer, or something I was just, "Ohmigod, what are we gonna do now?" and at the end of the day I think what I have found is that in a short period of time everybody's gonna forget about the highs, in a short period of time everybody's going to forget about the lows and those people that really are very, very successful do it year after year after year and they do it over 20 years, they don't do it one year or two years . . . and that's the hard part because in our business you have to tilt it up and get better each year, but you don't want to be too good. That's it and when you get too good and you, like us now, that we've grown so fast and so quickly that either you have to do one of two things, either you have to slow it down and grow more incrementally on the pace with national standards or you have to probably go think about a different job because you've created expectations you can't exceed and when you don't exceed no matter how good you are . . .

From Sam's examples as well as the information shared by the other participants in the research study, the concept of management of expectations—internally and externally—is a critical coping mechanism.

Managing Up

While managing expectations of others is crucial, it became apparent throughout the study that one of the most critical techniques and strategies was related to the work/balance of the institution's president and the relationship that the senior advancement professional

had with said individual. Additionally, presidential transitions and ambiguity had both positive and negative outcomes upon the lives of the participants.

Joan explained that her relationship with her current chancellor in this way, “She’s the best boss I have ever had! It is a joy to work for her . . . and I have certainly paid my dues. . . . She is my reward for living through them.”

Derek explained the visual example he uses to remind the president of the sheer amount of work they are producing on her behalf: “See that folder right there with all the paper (pointing to an overstuffed portfolio)? I carry that thing around intentionally so that the president will know that these are the projects that she’s given us.” This small example is illustrative of how senior development professionals view their world and attempt to manage up with the institution’s president.

Jesse’s relationship with his president provides an overall example through which the importance of this connection may be viewed:

I talk to him everyday. . . . this 8:00–9:00a.m. meeting was a debrief. So about every two weeks we sit down and look at what happened in the past two weeks with his schedule and stuff and what’s coming up for the next few weeks . . .

Jesse explained his president’s work/life balance in this way:

Well, it’s pretty amazing because he does a pretty good job of that I think better than he might get credit for because he’s always working . . . I think people would say he doesn’t have balance, but I think he actually does, but it’s not a balance the way a lot of people may describe balance for themselves but for him I think it is balance . . . fortunately for our guy he’s a hard worker, but he does have good balance, [he’s a] good person, [good] values so he doesn’t care if you get the job done between 2:00

a.m. and 9:00 a.m. or 9:00 a.m. and 5:00, it doesn't matter, he gets his job done, as long as you get it done so . . .

Jesse's relationship with his president appears to be highly functional and mission enhancing for the institution. Based upon the interviews for this project, the critical nature of a synergistic relationship between the senior advancement professional and the institutional leadership is apparent.

This critical role is not simply apparent from positive examples. Each of the participants had weathered leadership transitions and their comments illustrated the importance they placed on solid relationships with their presidents. Catherine indicated that she had left her former position due to situations with the president. In her estimation, he "was just not a good person." Anna indicated that she stayed in her current role because, ". . . he's a terrific guy and I don't think I'd be here if he wasn't and he's terrific on every level!"

Derek had also weathered a leadership transition, and based upon his descriptions his relationship was much stronger with the previous president (who hired him). It was also apparent that the current president did not have work/life balance in Derek's opinion:

(sigh) I'm gonna have a long conversation with her about balance too. A lot of the VPs here are overworked because my boss basically lives over in a house by herself, her mom lives there, but she doesn't really have a life...her life is the university and so she expects everyone else's life to be like hers and at least I have that mind-set . . . but to me the job is not important; it's not that important, to me the job is an end to a means so it's not as important to me as it is to some others . . . I'm not worried about whether if I feel like I need to go home and spend time or whatever, I've had these conversations with her, I'm just gonna do it if she doesn't like that's tough if she

doesn't like it she can fire me, I don't say it like that but for the most part, I've given her that impression that that's what I'm gonna do because I spend a lot of time here.

Derek even compared the balance of the two presidents to drive his point home:

Well one is by setting an example, like I said my president didn't have a life so now we don't have a life, because she hasn't set the example of having a balance whereas my former president did. There was always balance and so whenever he would go travel, do a week somewhere, his wife would join him and stay through the weekend and enjoy and have some balance: work hard and play hard.

Leadership transitions seemed to be an issue that many of the participants spoke about when discussing managing up and the importance of the presidential senior advancement professional relationship. This could be an area of future research as well.

Anna related how she was hired in October and the institution's president left in July. She explained to me how the interim president laid the ground work, but that it was still a rocky transition. But it was her commitment to the new president's vision and its possibilities to transform her city that made her stick with it:

I think fortunately [the interim president] said to [the new president] "She's a keeper," but he and I had some friction at the start of this and I didn't know what he was gonna do or how this was gonna work and I certainly was at a point where I could have walked away. I could retire, I mean easily I could have retired so it's his vision and his integrity that really kept me here, I want to help him be successful. I don't think people think about fundraisers as being driven by the mission but I think we are. . . . You can't raise money unless there's a vision; he has a very bold vision, for what he's trying to do and because I've lived here so long and he hasn't . . . I have

a great investment in what he's doing because it has the potential to have a huge impact on this city where I've lived since I was in my twenties so that part of it I think is terrific so I am very committed to his vision and therefore to him, more probably for the impact it could have on this city than the impact it'll have on the university to me that's more important and that's really the way we positioned this ...

Catherine is currently dealing with an extended search at her new institution and explained the situation in this manner:

I have a great relation with the university administration here thank goodness. The interim president is remarkably favorable towards women and I think honestly he sincerely likes to see women succeed and the Provost and the VP for Finance and the VP for Research and the VP for Student Affairs, I meet with them every two weeks for about an hour-and-a-half and it's a very cordial, very open and honest session. I feel really fortunate with that; it makes me a little nervous about the new guy coming in or new girl coming in.

To conclude the concept of managing up, it is a finding of this research study that an effective working relationship with the institution's president is critical for the maintenance of balance. Further, it is also clear that the work/life balance of the institution's leadership can impact the work/life balance of the senior advancement professional.

Relating with Donors

The basis of work itself for these professionals was used by several as a coping mechanism. Many derived joy and pleasure from their work with donors and related gift strategies. Sam, for example, still participates in every gift strategy above \$1,000,000. For

many this is one of their favorite aspects of their job, but one that often gets less attention when they are concentrating on bureaucracy and other mundane tasks.

For development officers, relating to donors is the key component for successful fundraising. Yet, as is typical in most organizations, the higher the position, the less contact with mission essential work. As with the role of children which was explored previously in this section, many of the individuals figuratively lit up with joy when speaking about favorite donors, successful gift strategies, and other donor related stories. The impact that donors have on a daily basis with these senior advancement professionals appears to be a key component of their success and another effectively managed work/life balance coping strategy.

Sense of Humor

The individuals who participated in this study also shared another trait. All had tremendous senses of humor. From the sarcasm of Derek to the quick wit of Catherine to the self-deprecation of Jesse, each of the participants was willing and able to laugh at themselves, their schedules, their work, and their attempts at balance. The first person quotes throughout the findings should give a perspective about the humor these participants enjoy (often at their own expense). It is apparent that a good sense of humor is an employable external coping mechanism for the participants. For example, when asked about her biggest regret, Joan shared, “Probably not buying Microsoft stock in 1982.” As Derek indicated with a smile on his face, “We’re talking about life balance, I can’t do everything for everybody!”

Sense of Self-confidence

One common trait which was discussed earlier during the internal constructs section was a sense of self. This internal construct manifests externally as a sense of

self-confidence. In these key leadership positions, it should come as no surprise that a sense of self-confidence is crucial. Yet, it may be viewed surprisingly as a technique and strategy for maintaining balance. These participants, however, do not appear to often second-guess their decisions or their authority, thereby using self-confidence to aid their efficiency. As Derek stated, “I’ve always acted as if and I have the mentality that I could be fired at any time.” Anna was also direct in her assertion:

Well I’m not ashamed to stand up and say here’s what I’ve accomplished and I’m proud of my record but I think you want the institution to shine and the leaders of the institution to shine I don’t think it propels the institution forward unless you do that.

Therefore, another finding of this study is that self-confidence, while an internal construct, has external manifestations that generate strategies and techniques for maintaining work/life balance.

Success of Strategies and Techniques

Another surprise was the view of the participants related to the success of these strategies and techniques. It became very apparent by my third phone interview that the success of these techniques and strategies was immutable from the strategies themselves for the participants. Without these techniques and strategies, they would not function at a peak level—and they are only used to functioning at a peak level. While every person asked if I had ascertained new or better strategies from other participants, their questions appeared from curiosity and the possibility of tweaking their own system, not to overhaul their own play book.

Jesse assessed his situation this way: “I think so, I’ve been doing it a long time, it seems to work. I don’t know if it works for everybody but it works for me.” Catherine

concluded “I think they’re pretty good.” Anna stated, “I want to do them too so they’re all compromises.” It is a finding of this study that the concept of success of these techniques and strategies—like work/life balance itself—is an internal construct of the individual participant.

Summary

The techniques and strategies the participants of this research project utilize to maintain work/life balance are expansive. Yet, there was little variance among the participants in the implementation of these strategies based upon gender, age, or other defined criteria. Exceptions to these strategies seemed more related to institutional budgets (i.e., administrative support staff) rather than a non-belief in their effectiveness. The two key strategies were managing time and organization which directly emanate from the internal constructs that the participants outlined. Employing a scheduler, a universal calendar, and effective use of small moments of time were critical time management techniques. Organization appeared throughout the thinking and relating process to tasks and responsibilities.

Additional techniques and strategies for maintaining work/life balance included relationship with assistant, role of spouse, role of children, mentorship, personal interests, managing e-mail, managing interruptions, managing staff, managing expectations, managing up, relationship with donors, sense of humor, and sense of self-confidence.

It is a finding of this study that a synergistic relationship with an assistant is a critical coping mechanism for maintaining work/life balance for these senior advancement professionals. These synergistic relationships may manifest in different styles, but having an indispensable assistant resonated through the entire interview process with the participants. Further, with respect to the role of spouse, it is a finding of this study that stay-at-home

spouses are a significant work/life balance technique for the participants in this study. The role of children also appears vital from a work/life balance perspective. It is a finding from this research project that the presence of children helps participants maintain work/life balance, and children are themselves a technique and strategy for maintaining said balance.

Mentorship, personal interests, managing e-mail, and managing interruptions were also techniques and strategies used by the respondents to this research study. Mentorship of employees related directly to the dispensing and delegation of large projects to junior employees for their direct management. This “sink or swim” strategy appeared universally employed by the participants. Participants in this study also actively pursued personal interests. From exercising to learning to play the piano, these personal interests, while all individual pursuits, manifested as key work/life balance maintenance strategies for the respondents. Managing massive quantities of e-mail also emerged as a technique and strategy employed. While several of the respondents used different approaches (at home, not at home), each employed what for them was an effective strategy for managing and processing large quantities of information. Managing interruptions was another technique employed by each of the participants. This strategy varied by individual (including what was considered an interruption), but employing a strategy to reduce time inefficiency with respect to interruptions was the norm.

Additionally, managing staff, managing expectations, and managing up were techniques and strategies explained by the participants. Managing staff—while disputed as a liked activity—was a strategy for maintaining balance in itself. Without effective staff management techniques, the participants appeared to view work/life balance maintenance as less likely. Another necessary technique for these senior advancement professionals was the

management of expectations placed on them mainly within the work environment. This construct of leveling expectations to remain on an even trajectory was critical. The final of this subset, managing up—that is, the effective relationship management with the institution’s chief executive officer—was critical. It was also apparent that just as important as the synergy with the assistant, synergy with this individual was critical for work/life balance. Transitions within the executive suite proved to provide issues for the participants in their efforts to maintain balance constructs.

Lastly, but importantly, the three remaining techniques and strategies implemented by participants in this study—relationship with donors, sense of humor, and sense of self-confidence—also provided essential coping mechanisms to maintaining work/life balance. Relating to donors is an important job function for the participants. Yet, it is also a finding of this research project that sense of humor and sense of self-confidence were essential strategies and techniques for maintaining work/life balance.

The internal constructs of efficiency, focus, and impatience coupled with a strong sense of self provide the lens through which the participants have developed their techniques and strategies for maintaining balance. Subsequently, their processes and procedures are inherently successful. If a strategy were inefficient or not effective, it is a finding of this study that its participants would stop using it.

Profession

The participants in this study were gracious in their willingness to explore work/life balance, but shared a number of other important findings about the profession while explaining the balance construct. Several of the respondents are nationally-known speakers about advancement and advancement training and could be viewed as experts in the

discipline. For these individuals, it is a goal to increase the view of the professionalism of advancement within academe, and they viewed this project as a manner in which to further that goal.

Throughout the previous sections, the drive and focus the participants have to transform institutions through effective management of advancement operations are apparent. After speaking with each of them, a number of striking similarities concerning their views about the profession emerged that provide another view about advancement as a profession. For illustrative purposes, these additional commonalities have been divided into six sections: favorite, least favorite, bureaucracy, new generation, typical, and new institutions. The common links of these traits provide a holistic view of senior advancement professionals and an additional lens through which we can learn about their work/life balance.

Favorite

Universally, the favorite parts of their work for these participants was the opportunity to interact with donors. Derek indicated that he enjoyed “the hunt for the big fish” and devising a strategy to catch them. Catherine simply stated, “working with donors” and matching them with campus funding priorities. Anna echoed this sentiment about working with donors. When asked if she had a particular favorite donor, she replied, “They are all my favorite!” She went on to say that she enjoys creating the “perfect storm,” which she defines as finding a project for them to become passionate about. She loves seeing dreams come true and loves visionary people. Jesse indicated that he loved working with donors and making things happen to move the institution along. Joan discussed why working with donors is her favorite opportunity in this way:

Through my work, I have the opportunity to meet people I would never meet. I live vicariously through brain surgeons and artists. I enjoy making things happen and I view development as empowerment to affecting change.

Sam added,

There's a lot of innovation and a lot of creativity and so you actually have chance coming here to make a difference because you can step in and do things and really move the institution forward, so I think number one is the opportunity to make a difference, number two the thing I love is that universities are great learning environments, there are so many people at these universities that are absolutely brilliant people that are doing incredible things to make the world better and you have so many opportunities every day to meet with people that can teach you and you can learn from so I love this learning environment itself and then I think the third one probably is the interaction particularly with the kind of work that we're in with the most successful people in the country.

Making a difference by working with people to make their dreams happen provides an interesting paradox for the respondents. These respondents crave by their own admissions: order, organization and efficiency, yet they also love working with people—who by their very nature may be disorderly, disorganized and inefficient. This intersection or balance between process and structure is a unique finding of this research project.

Least Favorite

The concepts of the respondent's least favorite things about advancement also were telling. By an overwhelming margin, the least favorite was bureaucracy, which will be discussed in greater detail in the following section. Other least favorite items and tasks again

involved inefficiency as well as issues about future generations of professionals (which will be discussed in its own section) and adequate compensation.

For example, Joan mentioned her commute time as her least favorite thing about her particular situation, but added that she is gravely concerned about the next generation of development leaders. Catherine added firing inefficient people who choose not to perform as her least favorite task and added how difficult it is to “cull bad performers.” Anna added that administration is her least favorite issue and also added that the constant turnover and hunt for new (professional) people was grueling. She also added that “weeding out” bad development professionals was becoming an ever-growing problem. It is important to note that even with the items that were the least favorite of the respondents they still dealt with them in an efficient, orderly fashion. By far the most difficult construct for them to navigate was bureaucracy.

Bureaucracy

The bureaucratic construct of higher education is in direct conflict with the key constructs of efficiency, effective time management, and focus of the senior advancement professionals interviewed for this study. Each and every participant cited bureaucracy as the most difficult issue that they face—from Derek who supplied depending upon the faculty and administration for quick answers as the bane of his existence to Sam who indicated that bureaucracy and the time things take to get done as his two biggest pet peeves.

Anna shared what she finds is exasperating, explaining:

[it is] not the development side. it’s the internal politics that’s the problem. I think development people are . . . more or less they go from A to B to C to D, you have your eye exactly on where you want to go, if you want to go through the steps to get

there, there's no sense of urgency here, there is very little sense of team players and I think it's really, it's, this might be very relevant in terms of universities . . .

[professors] are trained to do things more narrowly, narrowly and narrowly and they're not trained to work as team members, they hold on to their research, they don't share any information they've got, somebody else is gonna snatch their idea and . . . nobody's taught to be a team player and to think about the greater good, I think that's a huge disadvantage of academic training.

Anna also shared that she feels that higher education institutions, especially public ones are short-sighted about the need for philanthropic dollars. As she stated,

they are under the false impression that what's gonna make the difference is government dollars and as now are state spending is paying for less than 25% of our budget that's not the survival factor but it hasn't dawned on people here.

Derek stated,

the thing is . . . the more you do it and the more you spend time and the more you see efficient organizations, you really know how inefficient higher ed. is especially if you didn't come from higher ed. and I mean I knew it was bad but it just depends on what the university's [leadership is like] . . .

Based upon their personal strengths and successes, it is apparent that these individuals would have little patience for the bureaucratic process. Consequently, it is an additional finding of this research study.

New Generation

A concept that came up several times during our discussions was the work ethic of the next generation of professionals (those professionals who are members of Generations X

and Y—Generations X and Y are commonly thought to be comprised of the children born in the 1970s and 1980s, but the generations have very fluid boundaries). This issue manifested itself in a number of ways—from an unwillingness to work more than 40 hours a week to a sense of entitlement—but was clearly a management issue for the senior advancement professional respondents of this study. Joan stated, “They expect they will have it (*work/life balance*) and that their employer will accommodate it.

Derek illustrated the point with this example:

. . . I give them a lot of flexibility to have personal time to do things with their parents, dinner with children, um that kind of stuff, all they have to do is ask and I mean I don’t generally say, ‘No, you can’t do this.’ I do let them know that vacation time and time off is a privilege it’s not required by law that they [get] vacation time. They think that’s crazy. Another thing I do tell them is it’s very interesting that workers now think that because they did their job that that is an exceptional performance . . . I’m trying to relay to these people that you do your job, if you’re just doing your job then you get satisfactory. Satisfactory, that bothers them. They think because they did their job that it’s exceptional and that you owe them something and I tell them no, satisfactory means you did their job, I’m satisfied with what you did, that’s what it means.

Joan outlined dealing with the next generation as one of her least favorite issues.

Catherine shared that she had not personally “experienced that” but that she was aware from her peers of the increasing problem of finding advancement leadership for the next generation. Of note is that the professionals who were most vocal about this generational shift are the three youngest participants in this research study with a median age of 45 years.

This issue of the work ethic of the next generation of advancement leadership is also a potential direction for future research.

Typical

One of the more challenging questions for the respondents was “How typical do you view yourself among senior advancement professionals?” The concept of what a typical senior advancement professional looked like, worked like, balanced like provided some complexities. Jesse was matter of fact when he stated, “You know you’re going to have a better idea than that than anybody after going around and doing some of these interviews.” Anna stated, “I don’t know. I don’t know.” and followed that comment explaining that she rarely interacted with other senior advancement professionals so she was not sure. Jesse also shared that he rarely interacted with other senior professionals—his reasoning was worth noting, “I don’t really associate with uh, talk to a lot of other senior advancement managers particularly in this region because I see them as competition.” If they were typical or not seemed to be of less importance to the participants than if they were successful and if they were productive for their respective institutions.

The two most common responses about being atypical related to age and gender. Joan was glib with her initial reply, “Well, I am a girl!” This sentiment was also shared by Catherine, who also went on to discuss the age issue:

Well I guess you can say . . . I’m a different gender than most of them, if we’re talking presidents of foundations . . . [or vice chancellors . . .] I mean really, so the gender is still a little different, let’s say for the top people of the institution . . . From the third level down it’s 80% women, but then you get the first and second positions.

It's not yet common to think I'm young probably—you know that better than I do—but when I look around the [athletic conference, I know that] I'm young.

Jesse explained the concept of being typical and how it intersected with his work by sharing:

I don't know how typical I am: I think there are all types of people that are successful in this business so I don't know that there's any one right way to do things, but personally I see, the people I think that are really the best are the real disciplined, organized types; they've got everything organized, organizational structure to their time management. Everybody struggles with all of those things, but who controls it the best and manages it the best, [that] would be a better word I guess, because you can never control it, really, some parts you can, but you can't control it all [is successful]. I think the other thing too is people who are usually successful in this business are just [ones who] innately know how to do a good job, not that their boss is gonna evaluate them poorly if they don't, I mean that may be true but that's not what motivates, I mean you want to do a good job because you're supposed to do a good job. You're either a hard worker or you're not; you're either lazy or you're not and we all work hard sometimes and we're all lazy sometimes . . .

Interestingly enough, Derek also spoke about a lazy professional when discussing the typical construct:

[It is] a very good lifestyle . . . [sometimes, too good, I] noted that was when I went down [to] visit [a private school in a rural part of the state], I was in [town] looking at some properties one week [when] I was off and I saw a very top fundraiser [from the private school] and I was in the cafeteria for two hours having lunch with a real estate agent and he was sitting there reading a magazine, just reading the paper and

magazines during our lunch hour and through our two hour lunch, nobody there and I said man, he's got a great lifestyle (laughs), he got fired, so apparently it didn't last long but I would imagine it's typical [for some].

Derek also oscillated in his answer stating he was both atypical and typical based upon different criteria, and he was similar to the other respondents. It was apparent from the answers of the participants that it did not matter if they were typical or not, but rather that they were organized, successful, and driven. For the women, they were aware that being female and a senior advancement professional was atypical, but it did not impact their day-to-day work. Likewise, the younger participants (Derek, Joan, and Catherine) knew that their age was younger than the typical senior advancement professional, but they were much more concerned about performance and outcomes.

New Organizations

One of the interesting opportunities this research project presented was the opportunity to interact with two recently appointed senior advancement professionals at their new institutions. Both had previously served as the senior individual at other institutions, so were not new to the role, but rather the institutions they were serving. Those individuals spoke about the issues transitioning to a new development operation throughout their interviews, and it added depth to the balance issue in that previously identified strategies and coping mechanisms were still being developed and implemented at their new institutions. For example, Catherine shared:

. . . I do keep some of my own files this is actually kind of a point of still negotiation in learning with the [new institution] previously in [my former institution] somebody else handled the files and if I said I needed something they could you know whip it

out for me, that's not the way this office has most recently worked. The last president kept all of his own files in here in his office (laughs). That's kind of a frightening thought for me.

When a similar query was posed to Jesse, he responded in this way:

The only aspect of it that's different is the fact that at my last job I'd been there for ten years so I was a bit more routine, routine's not the right word but there were fewer, there was less of a start-up issue, so here I got that, some new guy things going on.

Even though she has been in her position for a number of years, Anna clearly and distinctly recounted the need for infrastructure in her advancement shop when she started several years ago: "We needed a lot of infrastructure stuff when I came there was, there were no files, no reports, there was nothing so we had to build the infrastructure while we were starting the campaign."

The issues of being new senior advancement professionals at a respective institution seemed to bring their own stressors that may or may not have an effect on work/life balance. Speaking with professionals in their positions fewer than two years may also yield rich future research.

Recruitment and Retention

Each of the six participants cited recruitment and retention as one of the most critical issues facing the profession. Based upon these interviews with senior advancement professionals, several key themes emerged about the recruitment and retention problem within institutional advancement. The most critical of these do not relate to work/life balance directly—and based upon the discussions with these senior advancement professionals—

work/life issues may not yield a cause-effect relationship with recruitment and retention issues.

First, with the current growth and proliferation of new positions within higher education development, there are simply not enough trained professionals to go around. For example, Catherine mentioned recently returning from a conference where she and the other participants (representing ten schools) thought they would hire an additional 100 new positions (consequently, new people) within the next five years.

Second, the “recycling” of ineffective professionals (individuals with unsuccessful records who position hop from institution to institution) was also mentioned; according to the respondents these individuals are getting hired because of the sheer number of available/vacant positions. Third, a lack of understanding by the general public about institutional advancement has led to little cross-pollination with successful recruitment of individuals from other industries with transferable skills.

Additionally, those individuals at the non-flagship institutions (Derek and Anna) mentioned that the salary ranges they can offer are directly affecting their abilities to recruit and then subsequently retain individuals. Both have “grown” their own staff, but have had difficulty retaining these staff members who have developed their fundraising skill sets.

Anna discussed the recruitment, training, and retention issue in this manner:

I think people really like working for me. We just did reviews, and I've heard over and over that people think this is the best shop in town. That if you want a job, if you want to work in a good shop, this is where you come, so I'm taking that at face value and assuming it's true. I work very hard to get these people pay raises and it's a horrible system. It's awful because development in [home of the state's flagship

institution], which is the zenith and is a private not-for-profit foundation, they're not part of the [state] system. They don't have to go through state anything! Here we are state employees so there are pay ranges for things that the state doesn't have any understanding of: what development jobs are and we're the biggest on the state system by a long shot so they don't understand what these jobs are.

Both she and Derek raised the issue that salaries for both professional and support staff are at a minimum 20–30% below market value. This certainly provides difficulty to attract and retain staff—specifically due to their urban locations and the presence of many other non-profit and development positions.

Of great significance to this study is an additional retention and recruitment issue that several respondents raised. Four of six (Anna, Joan, Derek, and Sam) cited the work ethic of the next generations of professionals (those individuals belonging to Generations X and Y) as a critical issue. According to these professionals, a generalized sense is that the next generation does not exhibit the willingness to sacrifice in order to achieve professional success. These newer professionals possess a sense of entitlement and a reluctance, as one respondent put it, “to pay their dues.” Joan indicated that she is unsure where the next generation of leaders in the profession will come from as on the one hand there are not enough people to go around and those that are present appear unwilling or unable to forego personal lives, interests, or other priorities even temporarily for the sake of their careers. Joan shared, “[There is a] much greater expectation among younger workers that they will have work/life balance even early in their careers.”

In an ironic twist, these managers previously stated their willingness to let staff members (who would comprise the next generation of leaders in the profession) work

flexible schedules and utilize other coping strategies. Further, these senior advancement professionals continue to groom them through mentoring, yet feel that those same strategies which these employees are using to maintain balance are preventing the development of the next generation of leaders. This concept of the next generation of advancement leaders is a possible topic for future research as is the intersection of balance and the grooming of advancement leaders.

Summary of Research Findings

The research findings for this project have been divided into five main sections: study participants, internal conceptualization of work/life balance, techniques and strategies and their perceived levels of effectiveness, profession, and recruitment and retention.

The first section about study participants outlined the respondents for this project and provided an overview about each. The six participants chosen for this study were senior advancement professionals at public Research Extensive Institutions as defined by the Carnegie Commission (2006). These professionals had no less than 12 years experience as a senior advancement professional. There was one person of color among the six respondents. An equal number of men and women were studied.

With respect to internal constructs, it is the finding of this study that the participants in this research study all had thought about work/life balance previously. Additionally, the study found that the female participants began thinking about work/life issues at an earlier age than the male participants. Further, the respondents made efforts to compartmentalize their thoughts in terms of work, family, and personal obligations and experiences in an apparent attempt to best organize themselves. All the participants viewed their lives in multiple dimensions which included work life, family life, and personal life; they also

viewed themselves as the “border crossers” that Clark (2000) described and one of the methodological frameworks being employed by this study.

With respect to internal constructs, respondents were asked to discuss their strengths, weaknesses, greatest successes, and regrets. There was surprising consistency among these four dimensions. Strengths revolved around organization, big picture vision, and focus. Weaknesses included impatience, bluntness, and a sense of urgency. Successes varied from dollars raised, personal accomplishment, to successful families and children—representing the three dimensions through which participants viewed the concept of work/life balance. Lastly, the participants had a surprising lack of regret. The participants reported staying in a position too long, missing an opportunity to network, moving around and away from extended family, and in some cases they reported none at all. The commonalities determined by Malnar (1996) including professional drive, willingness to make personal sacrifices, and lack of regrets with life choices were echoed by participants in their descriptions related to self-actualizations about work/life balance.

The participants of this research study utilized extensive techniques and strategies to maintain work/life balance. There was little variance among the participants in the implementation of these strategies based upon gender, age, or other defined criteria. Exceptions to strategies implementation seemed more related to funding rather than a non-belief in their effectiveness. The two key strategies exhibited by the participants were managing time and organization which directly emanate from the internal constructs that the participants outlined. Employing a scheduler, a universal calendar, and effective use of small moments of time were critical time management techniques. Further, organization appeared throughout the thinking and relating process to tasks and responsibilities.

It is a finding of this study that a synergistic relationship with an assistant is a critical coping mechanism for maintaining work/life balance for these senior advancement professionals. These synergistic relationships may be manifested in different styles, but having an indispensable assistant resonated through the entire interview process with the participants. Further, with respect to the role of spouse, it is a finding of this study that stay-at-home spouses are a significant work/life balance technique for the participants in this study. The role of children also appears vital in establishing work/life balance. The presence of children helps participants maintain work/life balance and are themselves a technique and strategy for maintaining said balance.

Mentorship, personal interests, managing e-mail, and managing interruptions also were techniques and strategies used by the respondents to this research study. Mentorship of employees related directly to the dispensing and delegation of large projects to junior employees for their direct management. This “sink or swim” strategy appeared universally employed by the participants. Participants in this study also actively pursued personal interests. From exercising to learning to play the piano, these personal interests, while all individual pursuits, manifested as key work/life balance maintenance strategies for the respondents. Managing massive quantities of e-mail also emerged as a technique and strategy employed. While several of the respondents used different approaches (at home, not at home), each employed what for them was an effective strategy for managing and processing large quantities of information. Managing interruptions was another technique employed by each of the participants. This strategy varied by individual (including what was considered an interruption), but employing a strategy to reduce time inefficiency with respect to interruptions was the norm.

Additionally, managing staff, managing expectations, and managing up were techniques and strategies explained by the participants. Managing staff—while disputed as an enjoyable activity—was a strategy for maintaining balance in itself. Without effective staff management techniques, the participants appeared to view work/life balance maintenance as less likely. Another necessary technique for these senior advancement professionals was the management of expectations placed on them mainly within the work environment. This construct of leveling expectations to remain on an even trajectory was critical. The final of this subset, managing up—that is, the effective relationship management with the institution’s senior executive officer—was critical. It was also apparent that just as important as the synergy with the assistant, synergy with this individual was critical for work/life balance. Transitions within the executive suite proved to provide issues for the participants in their efforts to maintain balance constructs.

The three remaining techniques and strategies implemented by participants in this study—relationship with donors, sense of humor, and sense of self-confidence—also provided essential coping mechanisms to maintaining work/life balance. Relating to donors is an important job function for the participants. Sense of humor and sense of self-confidence were also essential strategies and techniques for maintaining work/life balance.

The internal constructs of efficiency, focus, and impatience coupled with a strong sense of self provide the lens through which the participants have developed their techniques and strategies for maintaining balance. Subsequently, their processes and procedures are inherently successful. If a strategy is inefficient or not effective, the participants will not utilize it.

The participant's view of the profession—through the exploration of key concepts including favorite and least favorite activities, their view of how typical they are, their opinions about the next generation of advancement managers—provided other findings. These findings included the primacy of the donor relationships, the extreme dislike for bureaucracy, a greater concern about performance than about fitting the mold or stereotype as a senior advancement professional, and the potential that a new position or new campus leadership could impact their work/life balance construct.

Finally, the recruitment and retention issues shared by the participants included the sheer proliferation of new positions, the recycling of ineffective professionals, and the lack of career changers into the profession. Further, those at non-flagship institutions added the lack of competitive compensation as a key recruitment and retention issue.

CHAPTER 5

Conclusions and Areas for Future Study

Throughout this research project, I have studied the work/life balance of senior development professionals at public Research Extensive higher education institutions. The desired outcomes of this study were to learn about how these individuals view their work/life balance, what coping mechanisms they employ, and how the concept of work/life balance is related to recruitment and retention in institutional advancement.

Through this chapter, I will explain the overall conclusions of this study, make recommendations for future research about advancement and work/life balance, and add concluding remarks.

Primary Research Questions

This qualitative research project sought to address four main research questions:

1. How do the respondents conceptualize work/life balance in their lives?
2. What techniques and strategies do senior advancement professionals employ to maintain work/life balance?
3. What are the respondents' perceptions of the level of effectiveness of these techniques and strategies?
4. What do the respondents recommend to the profession to promote work/life balance for development officers?

To best answer the above questions, a phenomenological research design was employed.

Overall, the findings of this study were gender-neutral. The three male and three female participants shared similar opinions, styles, and strategies. There were also no distinguishable differences with respect to race. All participants, who ranged from their

mid-forties to their mid-sixties, shared concerns about the next generation of advancement leadership; there were no apparent differences among the participants by age other than the younger participants seemed more concerned about this next generation in a more vocal fashion.

Research Question One

The six senior advancement professionals who were participants in this study conceptualized work/life balance as an internal construct. In their descriptions of work/life balance, the participants reflected self-actualization constructs outlined by Malnar (1996) in her research including professional drive, willingness to make personal sacrifices, and lack of regrets with life choices. These participants expressed their frequent “border-crossing” between their work and family spheres of influence as explained by Clark (2000). Further, each case tested Kossek et al.’s (1999) hypothesis of organizational context combined with individual context yields work and family outcome.

Additionally, each of the participants in this research study had thought about work/life balance previously. One of the few gendered concept findings was that the female participants of the study began thinking about work/life issues at an earlier age than the male participants. All of the respondents made efforts to compartmentalize their thoughts in terms of work, family, and personal obligations and experiences. This surfaced in an apparent attempt to best organize themselves. Further, all of the participants viewed their lives in multiple dimensions which included work life, family life, and personal life; they also viewed themselves as the “border crossers” that Clark (2000) described.

There was consistency among the respondents when queried about their strengths, weaknesses, greatest successes, and regrets. Strengths revolved around organization, big

picture vision, and focus. Weaknesses included impatience, bluntness, and a sense of urgency. Success measures varied from dollars raised and personal accomplishments to successful families and children—representing the three dimensions through which participants viewed the concept of work/life balance. Consistent with Malnar's (1996) research, the participants had a lack of regret regarding their life choices. In this study, answers of the respondents ranged from staying in a position too long to missing an opportunity to network, from moving around and away from extended family to none at all. Overall, the participants viewed work/life balance (and its achievement) as an internal construct with outward implications.

Research Question Two

The second research question sought to identify strategies and techniques that senior advancement professionals utilized to maintain work/life balance. These techniques and strategies are extensive. Yet, there was little variation among the participants in the implementation of these strategies based upon gender, age, or other defined criteria. Exceptions to these strategies seemed more related to institutional budgets (for example, administrative support staff), rather than a non-belief in their effectiveness. The two main strategies were managing time and organization. Employing a scheduler, a universal calendar, and effective use of small increments of time were critical management techniques. The concept of organization—how the participants methodically and systematically planned their lives—appeared throughout the thinking and relating process to tasks and responsibilities.

Additional techniques and strategies of the participants for maintaining work/life balance included their relationship with their assistant, the role of their spouse, the role of

their children, mentorship of subordinates, personal interests, managing e-mail, managing interruptions, managing staff, managing expectations, managing up, their relationship with donors, having a sense of humor, and having a sense of self-confidence.

A synergistic relationship with an assistant is a critical coping mechanism for maintaining work/life balance according to these senior advancement professionals. These synergistic relationships may be manifested in different styles, but having a key assistant resonated through the entire interview process. Further, with respect to the role of spouse, stay-at-home spouses were identified as significant in sustaining work/life balance for the participants in this study. The presence of children in a household helped participants maintain work/life balance.

Being a mentor, having personal interests, managing e-mail, and managing interruptions also were techniques and strategies used by the respondents in this study. Mentorship of employees related directly to the dispensing and delegation of large projects to junior employees for their direct management. This “sink or swim” strategy was employed universally by the participants. The participants in this study also actively pursued personal interests. From exercising to learning to play the piano, these personal interests—while all individual pursuits—were key work/life balance maintenance strategies for the respondents. Successfully managing massive quantities of e-mail also emerged as a technique and strategy employed. While the respondents used different approaches to manage e-mail (at home, not at home), each employed what for them was an effective strategy for managing and processing large quantities of information. Managing interruptions successfully was another technique employed by each of the participants. This strategy varied by individual (including

their definition of what was considered an interruption), but employing a strategy to reduce time inefficiency with respect to interruptions was the norm.

Additionally, managing staff, managing expectations, and managing up were techniques and strategies utilized by the participants. Managing staff, while disputed as an enjoyable activity, was a strategy for maintaining balance in itself. Without effective staff management techniques, the participants appeared to view the potential for successful work/life balance maintenance as less likely. Another necessary technique for these senior advancement professionals was the management of expectations placed on them mainly within the work setting. This construct of leveling expectations to remain on an even trajectory was critical. The final aspect of this subset, managing up—that is, the effective relationship management with the institution’s chief executive officer—was critical. It was also apparent that, just as important as was the relationship with the assistant, synergy with this individual was critical for work/life balance. Transitions within institutional leadership (new presidents, interim presidents, etc.) proved to provide issues for the participants in their efforts to maintain balance constructs.

Lastly, but as important, the three remaining techniques and strategies implemented by participants in this study—their relationship with donors, having a sense of humor, and having a sense of self-confidence—also provided essential coping mechanisms to maintaining work/life balance. Relating to donors is an important job function for the participants. Yet, it is also a finding of this research project that having a sense of humor and a sense of self-confidence were essential strategies and techniques for maintaining work/life balance.

These techniques and strategies for maintaining balance echo the findings in similar research studies exploring the work/life balance of leaders in high stress organizations and the for-profit sector as outlined in the literature review (Blair-Loy, 2003; English, 2003; Fletcher, 2002). These findings share rich data about this subpopulation but found similar coping strategies—relationship with assistant, focus, time management among others—to previous studies which explored work/life balance in other professional disciplines including student affairs, medicine, and law (Blair-Loy, 2003; English, 2003; Padulo, 2001; Saltstein, 2001).

Research Question Three

The internal constructs of efficiency, focus, and impatience coupled with a strong sense of self provide the lens through which the participants have developed their techniques and strategies for maintaining balance. Subsequently, their processes and procedures were successful. If a strategy was inefficient or not effective, the participants did not employ or stopped using the technique or strategy. These findings relate to previous studies by Fletcher (2002) and Blair-Loy (2003).

Research Question Four

The participants in this study outlined that improved work/life balance has a trickle down affect. The work/life balance of the institution's president directly affects their work/life balance. Consequently, their work/life balance affects the work/life balance of their employees.

A suggestion recommended by the participants to improve work/life balance for institutional advancement professionals (as well as to improve retention) related to the caste system within higher education; that is, development officers and other senior administrative

staff members have a lower position or status than faculty. For several, the expectations and lack of job security provided by their status as staff members was a point of concern. For example, Joan pointed out concerns with the lack of maternity leave (and other balance related issues) when she was a younger professional at her former institution.

Implications for Practice

This study provided a number of implications for practice within the institutional advancement profession in general, and within individual institutional advancement offices particularly. First, the respondents clearly indicated that work/life balance was personal and individual. Each participant cited work/life balance as an issue, but he/she had not participated in formal, on-going discussions about the topic. Consequently, professional development programs at individual campuses, on-going workshops at national association meetings, and periodic columns in industry publications are needed. These programs, workshops, and articles could provide strategies and solutions related to work/life balance issues or simply a framework within which to explore career advancement and planning. Launching a formal dialogue—perhaps an issue of *CASE Currents* or a campus retention program—may foster more discussion about the topic and its resulting issues.

Another critical element is related to the gender neutrality of the work/life balance issues for senior advancement professionals. With respect to the individuals who participated in this research project, maintaining work/life balance was not a male or female issue. Consequently, creating a balance-friendly culture within an institutional advancement office should not be viewed as only a “women’s issue” or an issue that affects only “working mothers.” Rather, programming and human resources discussions concerning work/life balance should focus on the root issues rather than gender. These programs could include

skills assessments, stress management techniques, workshops for hiring managers about work/life balance, and in-office exercise classes among others. Additional conversations about job-sharing, nontraditional hours, and self-management should be fostered by institutional management and human resources professionals.

A balance-friendly culture emerged as a management strategy for the senior advancement professionals who participated in this study. These senior advancement professionals were willing to use flexible scheduling, job sharing, and other techniques to keep staff members happy and productive. Retention of key staff was mentioned a number of times during this study, and its interaction with work/life balance appears to have ramifications for the profession. As the profession continues to grow and expand, other institutions (and senior advancement professionals) will need to employ similar strategies as there are currently many more positions than individuals to fill those positions, and it appears that Generation X and Generation Y professionals will continue to gravitate toward balance-friendly organizations. Additional research should be conducted to seek out solutions for the leadership gap identified by participants in this study.

Maintaining high-level or increasing productivity also appeared to be critical to the success of balancing work/life. Therefore, encouraging these skill sets that foster productivity could prove beneficial for advancement managers, and reviewing candidates with these skill sets could be productive for hiring officials. As this sense of focus and drive appeared to be innate for a number of the participants, providing workshops and skills-based training for current employees may be an effective management technique. Raising interview questions concerning productivity, managing interruptions, and handling e-mail may be worthwhile when interviewing potential candidates. Further, it is possible that interview questions that

directly relate to work/life could be utilized effectively. The respondents indicated that the synergy of relationships between president and senior advancement professional and senior advancement professional and executive assistant is critical; determining the institutional “fit” of potential candidates for these positions is essential.

The profession has the opportunity to provide a balance-friendly culture through its professional associations, individual institutions, and by the example of senior advancement professionals such as the respondents for this study. By promoting balance, the profession may recruit additional members to its ranks, thereby making work/life balance a reason for recruitment instead of an issue for retention.

Recommendations for Future Research about Work/Life Balance

Many avenues for future research exist within the work/life balance construct. The discussion of work/life balance of single professionals as its own topic may be an interesting exploration as it appears that there may be different issues for these professionals. The further exploration of the presence of children in the household as well as the identity issues of stay-at-home partners may be information rich, as may be the review of additional coping strategies and the key role of the executive assistant for maintaining balance. With respect to work/life balance of higher education development professionals, additional research could be conducted about work/life balance by type of institution (Carnegie Commission, 2006), by number of years employed at the institution, or by studying development officers who chose not to pursue vice presidential positions. Moreover, additional research could be conducted with less senior advancement professionals and their work/life balance issues. Additional research with the emerging generation of advancement leadership would be beneficial.

Recommendations for Future Research about Institutional Advancement

Many potential areas for inquiry about institutional advancement in higher education emerged from this study—from the impact of private funds upon the teaching and research missions of institutions to the career paths of development professionals. With large gaps in research concerning advancement, a great opportunity for increased scholarship on this emerging profession and critical area within academe is available. One of the most critical aspects of research about advancement is bridging the work to other disciplines and its role within the academic enterprise. Unlike student or academic affairs, institutional advancement has not been studied in depth. Too little is known about the background of development, its impact on campus and, in the broader context, the individuals who give to institutions, and the professionals who solicit contributions from them. With billions of dollars in campaign funding currently being solicited, it is apparent that development operations will continue to evolve and grow. It is imperative that additional research be conducted to explore development's role, focus, and influence within higher education.

Additionally, more research concerning the leadership interaction between senior advancement professionals and institution presidents should be conducted to ascertain and evaluate the synergistic relationship. Further research also may be conducted about the next generation of advancement professionals and how to encourage career changers to enter the profession.

Closing Thoughts

Over the past four years, this research project has become my own lens through which I view work/life balance. One of my friends recently called it my “third” dimension. In a sense, he is correct; this academic component of my life is an often overlooked

area—specifically in my new community—by those who know me in my work role, as a friend or family member, or as an active community member. Since beginning my degree journey at Iowa State, I have switched jobs twice—once requiring a cross-country move. As was the experience of the participants, some days there is a swell in certain areas including family priorities, work, and personal interests. As I suspected, there is no “magic bullet,” no concrete way to best manage, juggle, or balance; it is a matter of devising a system that works—personally, professionally, and relationally. Ironically, these individuals were hoping I could enlighten them about work/life balance in their lives. Balance for these individuals is not a choice and is not optional—it is a state of being. Jesse said, “I just think I always kinda had that. It wasn’t one day I woke up and said hey, I need to balance my life or this isn’t gonna work; I think I’ve always had that, [and] have been aware it’s something I want.” Balance and the perceptions of this study’s participants about it are just one component of their overall success.

APPENDIX A

Project Consent Form

Title of Study: In the Balance:
Work/life balance of senior development professionals within
higher education

Investigator: Karlene Noel Jennings Iowa State University
206 Bridge Lane 515/231-7333 or 757/221-7779
Yorktown, VA 23692 knj@iastate.edu

This is a research study. Please take your time in deciding if you would like to participate. Please feel free to ask questions at any time.

Introduction

This form outlines the purposes of the study and provides a description of your involvement and rights as a participant. The entire study will take place from May 15, 2006 through December 1, 2007, and your participation will occur for a brief period during that time.

The purposes of this project are:

1. to satisfy a degree requirement for the Doctor of Philosophy degree at Iowa State University of Science and Technology;
2. to gain an understanding of your experience as a senior development professional at a Research-Extensive higher education institution;
3. to gain an understanding regarding work/life balance.

You are being invited to participate in this study because you are a senior advancement professional at a Research Extensive Public Institution of higher education as defined by Carnegie Commission on Higher Education.

Description of Procedures

If you agree to participate in this study, your participation will last for no more than three months and will involve a series of interviews (including at least two phone interviews, but no more than four; and one in-depth in-person interview.) Your entire participation will require less than eight hours of time.

During the study you may expect the following study procedures to be followed. As a participant in this study, you will be both interviewed and observed. The information gained from the interviews and observations will be used in the written report of the case report.

The following data gathering procedures will be followed:

1. initial contact with possible participant via email
2. follow up with initial phone contact to ascertain their availability (and confirm they meet the sample guidelines; 12 years in development; currently employed at a public, Doctoral/Research Extensive higher educational institution
3. send participant and receive back a copy of the project consent form
4. initial phone interview (approximately 30 minutes) at least two weeks prior to in-depth interview. (questions will be emailed in advance and will be of a demographic and life history nature).
5. in-depth personal interview (approximately 60-90 minutes). This interview will have open-ended questions concerning balance and will reflect previous conversations.
6. follow-up phone interview within 10 days of personal interview. Determine if additional comments based upon additional reflection time and ask follow-up questions that may arise from initial data analysis. (approximately 30 minutes)
7. after transcription, conduct and verify transcribed text with participant.

The following are the terms of participating in the case report:

1. The information obtained during this project will be used to write a case report which may be read by the participant, the program of study committee, and in its final form, be deposited in the library at Iowa State University.
2. Real names, nor other identifying information, will not be used during data collection nor in the written case report.
3. If you grant permission for audio taping, no audio tapes will be used for any purpose other than to do this study, and will not be played for any reason other than to do this study. At your discretion, these tapes will either be destroyed or returned to you.
4. You have the right to withdraw at any time from the study, for any reason, and the data will be returned to you upon request.
5. You will receive a copy of the case report before the final draft is written and negotiate changes with the researcher.
6. You will receive a copy of the final case report soon after completion.

7. You may skip any question that you do not wish to answer or that makes you feel uncomfortable.”

Risks

There are no foreseeable risks at this time from participating in this study.

Benefits

If you decide to participate in this study there may be no direct benefit to you. [A benefit is defined as a “desired outcome or advantage.”] It is hoped that the information gained in this study will benefit society by providing valuable information about work/life balance and its affect on the advancement profession.

Costs and compensation

You will not have any costs from participating in this study. You will not be compensated for participating in this study.

Participant Rights

Your participation in this study is completely voluntary and you may refuse to participate or leave the study at any time. If you decide to not participate in the study or leave the study early, it will not result in any penalty or loss of benefits to which you are otherwise entitled.

Confidentiality

Records identifying participants will be kept confidential to the extent permitted by applicable laws and regulations and will not be made publicly available. However, federal government regulatory agencies, the Program of Study Committee and the Institutional Review Board (a committee that reviews and approves human subject research studies) may inspect and/or copy your records for quality assurance and data analysis. These records may contain private information.

To ensure confidentiality to the extent permitted by law, the following measures will be taken: unique identifiers will be assigned, and all associated materials will be kept in a locked file or in a password protected computer file. Data will be kept until the study is completed or December 2007, whichever is earlier. If the results are published, your identity will remain confidential.

Questions or Problems

You are encouraged to ask questions at any time during this study.

- For further information about the study contact Karlene Noel Jennings, 515-231-7333 or John Schuh, Distinguished Professor, Educational Leadership and Policy Studies, Iowa State University, 515-294-6393.
- If you have any questions about the rights of research subjects or research-related injury, please contact Ginny Austin Eason, IRB Administrator, (515) 294-4566, austingr@iastate.edu, or Diane Ament, Director, Office of Research Assurances (515) 294-3115, dament@iastate.edu.

Subject Signature

Your signature indicates that you voluntarily agree to participate in this study, that the study has been explained to you, that you have been given the time to read the document and that your questions have been satisfactorily answered. You will receive a copy of the signed and dated written informed consent prior to your participation in the study.

Subject's Name (printed) _____

(Subject's Signature)

(Date)

Investigator Statement

I certify that the participant has been given adequate time to read and learn about the study and all of their questions have been answered. It is my opinion that the participant understands the purpose, risks, benefits and the procedures that will be followed in this study and has voluntarily agreed to participate.

(Signature of Person Obtaining
Informed Consent)

(Date)

APPENDIX B

Additional Material

Basic outline of the interview process employed:

1. initial contact with potential participants via email.
2. follow up with initial phone contact to ascertain their availability (and confirm they met the sample guidelines; 12 years in development; currently employed at a public, Doctoral/Research Extensive higher educational institution
3. send participant and receive back a copy of the project consent form
4. initial phone interview (approximately 30 minutes) conducted approximately two weeks prior to in-depth interview. (questions will be emailed in advance and will be of a demographic and life history nature).
5. in-depth personal interview (approximately 60-90 minutes). This interview utilized open-ended questions concerning balance and reflected previous conversations.
6. follow-up phone interview after personal interview. Determined if participant wished to share additional comments based upon additional reflection time and asked follow-up questions that may have arisen from initial data analysis. (approximately 30 minutes)
7. after transcription, conducted member check with participant.

Draft of initial email contact:

Dear (Insert Name):

You have been identified as a potential participant in a research study concerning work/life balance with senior development professionals. ("You were recommended by" or "I was referred by" may be included.)

This project is a degree requirement for the Doctor of Philosophy Degree in Education at Iowa State University of Science and Technology.

As a development professional myself, I am hopeful that you will choose to participate in this research project as it is likely that others may benefit from your expertise and perspective.

Attached for your review is a copy of the Project Consent form which you will be asked to complete if you decide to participate.

I will plan to call you (insert date) to set up a time that we can discuss your potential involvement in the project.

Thank you in advance.

Sincerely,
Karlene N. Jennings

Phone contact questions:

These questions would be used to follow up on the initial email and used to verify that a participant fits within the potential sample.

(Insert name), are you the (insert title) at (insert institution name)?

Is this the most senior fundraising position at (insert institution name)?

(Insert institution name) is a publicly governed institution of higher education?

(Insert institution name) is classified as a Research Extensive Institution by the Carnegie Commission?

(Insert name), have you been employed in a senior development position for twelve or more years?

If the answers to the above questions are all yes:

“Thank you so much for speaking with me today. According to the research protocol for this study, you fit the stated criteria. I would like to ask you to participate and will be sending you a project consent document for your signature. May we set up another time – approximately thirty minutes--to discuss the initial set of questions?”

If the answers to the above questions are not all yes:

“Thank you for your time. Unfortunately your experience does not meet the criteria outlined for the research protocol. I certainly appreciate your willingness to speak with me and wish you much success in your fundraising.”

Initial phone interview questions:

These questions will be emailed to the participant in advance for their review. The questions will be primarily of a life-history and demographic nature.

1. Tell me about yourself.
2. If you had to provide a 30 second elevator speech about yourself, what would you say?
3. Please share your employment history. How long have you worked in development? Number of institutions? Number of positions?
4. Please describe your personal history. Do you have a life partner? Children? Age? Background?
5. Tell me about your present job.
6. What is your favorite thing about development?
7. What is your least favorite thing about development?

In-depth personal interview questions:

The following list of potential questions will be augmented to reflect the participants responses. A 90-minute interview protocol will be utilized as many of these individuals conduct similar length interviews (or visits) with potential donors.

1. Is work/life balance a topic you have previously thought about? Please explain.
2. Is work/life balance something you feel you achieved? Please explain.
3. How do you conceptualize your work/life balance?
4. What techniques and strategies do you employ to maintain balance?
5. How effective are these techniques for you?
6. Have your work and life ever conflicted? If yes, please explain and provide a few examples.
7. Throughout your career, at what point did you achieve work/life balance the best in your estimation?
8. What are your biggest strengths/ biggest weaknesses?
9. Has your work/life balance ever caused difficulties in your home life? With spouse? With Children? Please provide examples.
10. Has your work/life balance ever caused difficulties in your work life? With supervisors? With subordinates? Please provide examples.
11. What is your favorite activity outside of work? When was the last time you participated in that activity? How did it make you feel?
12. What is your biggest accomplishment?
13. What do you regret?
14. Earlier we spoke about techniques and strategies for maintaining balance, have you thought of additional ones? What are they?
15. What does a typical week look like for you?
16. How many nights and weekends do you spend working?
17. Define "spend working"
18. What does it look like to you if you "bring work home?"
19. How satisfied are you personally and professionally?
20. With respect to higher education development, how can work/life balance be promoted?
21. How typical among senior advancement professionals do you view yourself?
22. Other ideas you would like to share?

Follow-up interview questions:

The follow-up questions will be based upon the in-depth personal interview and may include specific questions as they relate to specific respondents' previous answers. Key follow-up questions include:

After reviewing notes from our discussion, can you clarify your statements about (insert topic)?

Since we met in person have your opinions about your personal work/life balance changed?

Since we met in person have you thought more about what coping mechanisms you employ? May employ in the future?

Have you asked peers about their work/life balance? What feedback have you received?

Have you thought more about the techniques and strategies your peers might use to stay in balance? What are they?

Any additional comments that you would like to share?

Member check

The member check will include sending the participant a copy of the interview transcription and my related notes for their review and clarification.

APPENDIX C

List of Carnegie Research Extensive Public Institutions by State (from <http://www.washington.edu/tools/universities.html#public>)

Alabama

Auburn University
University of Alabama at Birmingham
University of Alabama

Arizona

Arizona State University
University of Arizona

Arkansas

University of Arkansas Main Campus

California

University of California-Berkeley
University of California-Davis
University of California-Irvine
University of California-Los Angeles
University of California-Riverside
University of California-San Diego
University of California-Santa Barbara
University of California-Santa Cruz

Colorado

Colorado State University
University of Colorado at Boulder

Connecticut

University of Connecticut

Delaware

University of Delaware

Florida

Florida International University
Florida State University
University of Florida
University of South Florida

Georgia

Georgia Institute of Technology
Georgia State University
University of Georgia

Hawaii

University of Hawaii at Manoa

Idaho

University of Idaho

Illinois

Northern Illinois University
Southern Illinois University at Carbondale
University of Illinois at Chicago
University of Illinois at Urbana-Champaign

Indiana

Indiana University at Bloomington
Purdue University Main Campus

Iowa

Iowa State University
University of Iowa

Kansas

Kansas State University
University of Kansas Main Campus

Kentucky

University of Kentucky
University of Louisville

Louisiana

Louisiana State University and Agricultural and Mechanical College

Maine

University of Maine

Maryland

University of Maryland Baltimore County
University of Maryland College Park

Massachusetts

University of Massachusetts

Michigan

Michigan State University
 University of Michigan-Ann Arbor
 Wayne State University
 Western Michigan University

Minnesota

University of Minnesota-Twin Cities

Mississippi

Mississippi State University
 University of Mississippi
 University of Southern Mississippi

Missouri

University of Missouri - Columbia

Nebraska

University of Nebraska - Lincoln

Nevada

University of Nevada, Reno

New Hampshire

University of New Hampshire

New Jersey

Rutgers, The State University of New Jersey, New Brunswick Campus

New Mexico

New Mexico State University
 University of New Mexico

New York

City University of New York Graduate Center
 State University of New York at Binghamton
 State University of New York at Buffalo
 State University of New York at Stony Brook

North Carolina

North Carolina State University
 University of North Carolina at Chapel Hill

Ohio

Kent State University Main Campus

Ohio State University Main Campus Ohio University Main Campus
 University of Cincinnati Main Campus
 University of Toledo

Oklahoma

Oklahoma State University
 University of Oklahoma Norman Campus

Oregon

Oregon State University
 University of Oregon

Pennsylvania

Pennsylvania State University University Park
 Temple University
 University of Pittsburgh, Pittsburgh Campus

Rhode Island

University of Rhode Island

South Carolina

Clemson University
 University of South Carolina - Columbia

Tennessee

University of Memphis
 University of Tennessee, Knoxville

Texas

Texas A&M University
 Texas Tech University
 University of Houston
 University of North Texas
 University of Texas at Arlington
 University of Texas at Austin

Utah

University of Utah
 Utah State University

Vermont

University of Vermont

Virginia

Old Dominion University

University of Virginia
Virginia Commonwealth University
Virginia Polytechnic Institute and State University

Washington
University of Washington
Washington State University

West Virginia
West Virginia University

Wisconsin
University of Wisconsin-Madison
University of Wisconsin-Milwaukee

Wyoming
University of Wyoming

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